

PLANNING OUR FUTURE:

Sustainability Committee Final Report

March 4, 2009

Please note that this report and the recommendations therein are a work in progress and are intended as a long term project. This report has more immediate significance due to the proposed reductions in the PHMC budget for FY 2009-10.

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Executive Summary

The Bureau of Historic Sites and Museums (BHSM) of the Pennsylvania Historical and Museum Commission (PHMC) has undertaken an internal review of its historic sites and museums to guide planning for the future. BHSM needs to use this self study to develop a forward-looking, proactive, action plan for sustaining those sites and museums in the face of budget challenges.

The goals of Planning Our Future are to determine the highest and best uses for our sites and programs and the most cost-effective means of delivering them while we continue to fulfill our mission to preserve and interpret. The first step in achieving these goals is to study ourselves.

The Planning Our Future Report contains the Sustainability Committee's recommendations for potential scenarios at each site or museum and general recommendations for future Bureau operation. This report is intended for discussion; it does not contain final recommendations.

The Committee feels that, with the implementation of some of these scenarios and general recommendations, BHSM will be better prepared to meet 21st century museum world challenges by better serving our public.

Overall PHMC, Bureau and site missions and planning processes should include:

- 1) making our sites and museums relevant and responsive to today's changing audiences,
- 2) improving productivity through sharing resources among sites,
- 3) building fundraising capacity in Associate groups, and
- 4) increasing marketing to raise public awareness of PHMC sites.

PHMC MISSION

The Pennsylvania Historical and Museum Commission preserves the commonwealth's memory as a teacher and champion of its heritage for citizens of Pennsylvania and the nation.

PHMC VISION

The Pennsylvania Historical and Museum Commission enriches people's lives by helping them to understand Pennsylvania's past, to appreciate the present and to embrace the future.

*2007-2008 PHMC
Annual Report*

Introduction

The Bureau of Historic Sites and Museums directly operates and supports 22 historic sites and museums throughout the Commonwealth, using a combination of GGO, Associate, Keystone, and capital funding.

Appendix A includes a list of PHMC sites/museums

BHSM has conducted an internal review and self-study of its sites to determine where we are, what we should be doing, and how we need to change in order to meet future needs. The results clearly indicate that sustaining such diverse sites cannot be achieved with "cookie-cutter" solutions, but instead require site specific adaptations of broad-based management policies and budget allocations.

Planning Our Future

An AAM survey conducted in November 2007 asked “What do you think is the single most significant challenge facing the museum profession over the next several years?”

Responses identified the top four challenges as funding, technology, leadership development, and maintaining public relevance.

Rather than focus exclusively on sustainability, the goal of the review and self-study is to help BHSM make the best possible use of physical, human and financial resources as we move deeper into the 21st century.

Several factors make this a good time to plan for the future:

- The current PHMC strategic plan will include reviews of all Bureaus.
- Hiring a new Bureau Director provides an opportunity for a change in leadership and BHSM’s internal review should be done as part of that change.
- BHSM receives slightly over 50% of the agency’s budget, so changes to that budget could have a direct and dramatic effect on site operations. BHSM is faced with the need to operate sites and museums more efficiently and cost-effectively and must react proactively rather than reactively to continuing agency budget challenges.
- The museum/historic site field is evaluating methods of operation; other state history agencies and private museums are going through similar processes.

The Commonwealth of Pennsylvania faces economic challenges similar to other states throughout the country. As revenues continue to fall, the Governor has cut budgets, limited travel, instituted a hiring freeze, and frozen management salaries. Within this context, the PHMC is looking at overall operations as a means to respond to these financial challenges.

Other state organizations looking for sustainability solutions include Maryland, who has developed the Maryland Resident Curatorship Program to maintain some of their historic structures. The program manages 44 buildings through the Maryland Department of Natural Resources.

Carl Nold, President and CEO of Historic New England (HNE), notes that museums must add value to their communities. HNE’s website lists historic properties owned by the organization that are for sale or rent with covenants.

APVA Preservation Virginia is considering innovative ways to share staff— either within their system or by purchasing time from adjacent, non-APVA museum staff.

Some private museums are also closing or curtailing operations; others are considering alternative uses — Colonial Williamsburg Foundation chose to sell Carters Grove rather than keep it open as a museum.

Planning Our Future

“[U]ntil now, most historic houses have been preserved strictly for the buildings’ sake.

Many house museums... are in crisis, unable to do the very thing most important to their ability to serve their community: to respond to the changing environment by reinventing themselves programmatically.

Clearly it is time to find alternative stewardship arrangements... uses that will allow them to continue contributing to the visual, architectural, and historic fabric of their surroundings.”

--From ‘Historic House Museums: An Embarrassment of Riches?’ by Marian Godfrey, Forum Journal, Spring 2008.

Goals for the Sustainability Study

In April 2007, the Forum on Historic Sites Stewardship in the 21st Century, sponsored by the Rockefeller Brothers Fund and the National Trust for Historic Preservation, was held at National organizations have been examining sustainability issues and practices for museums and historic sites during the past few years. Kykuit. Conference proceedings were published in the National Trust’s Forum Journal in Spring 2008.

Generally, findings from the conference noted that long-term historic site stewardship includes:

- assuring financial sustainability,
- meeting local community needs,
- reviewing methods beyond attendance to evaluate the value of a site experience,
- fostering essential innovation and encouraging sites to try new programs,
- achieving balance between buildings, landscapes, collections and visiting public needs,
- carefully reviewing collections,
- and exploring the option of returning sites to private ownership with proper easements.

Appendix C includes a complete list of the Findings and Recommendations

The American Association for State and Local History’s Historic House Affinity Group Committee recently published a Technical Leaflet, “How Sustainable Is Your Historic House Museum.” The leaflet contains eleven characteristics of a sustainable historic house museum, many of which are similar to the Kykuit conference findings.

A complete list of the AALSH characteristics is in Appendix C

James Vaughan, Vice President for Stewardship of Historic Sites at the National Trust for Historic Preservation, reported that the Trust is working to build better boards, recommending capital campaigns where a percentage of money raised goes to endowment, switching from a Heritage Tourism model to a community-based business model, looking at diversified sources of revenue and working to make NTHP sites friendlier by providing more welcoming visitor experiences.

Within that context, the following goals were set by Bureau of Historic Sites and Museums for its own sustainability study, “Planning Our Future”:

1. To operate BHSM properties more cost-effectively while continuing to fulfill PHMC’s mission.

2. To meet PHMC's 2008-2011 strategic plan goals by:
 - evaluating PHMC's governance and structure to strategically allocate resources—more specifically, to assess the internal organization and structure of PHMC programs and bureaus.
 - expanding and diversifying financial support for core functions and priority projects.
 - strengthening operational and programmatic effectiveness by budgeting and managing fiscal resources effectively and by evaluating, maintaining and improving PHMC facilities, especially historic sites.
3. To provide long-term sustainability for the PHMC's sites and museums program.
4. To envision where BHSM would like to be in 5 years and in 15 years.

Methodology - Creating the Plan

BHSM worked with PHMC staff members to develop a planning process for creating the highest and best use of its historic sites and museums. Steps in this process are described below and were approved by Barbara Franco, Executive Director of PHMC, in January 2008.

STEP 1.

Review information from other site and museum management programs relative to their evaluation and improvement of the cost-effectiveness of operations.

This research includes a review of existing literature on the subject and conversations with colleagues who are familiar with museum sustainability. BHSM will also gather information from other Commonwealth employees on processes to follow that are outside of PHMC standard activities—such as property leasing/surplusing.

Appendix C lists these background materials

STEP 2.

Assemble background material about BHSM sites and museums. Include attendance numbers, PHMC revenue and expense figures, Associate staff levels, Associate membership statistics and Associate revenue and expenses.

Self-Study Begins

The self-study began in January 2008 and proceeded through the following actions:

1. An analysis tool/site assessment to be completed by all sites and museums was drafted by Division Chiefs in January. This assessment tool was further refined by site administrators in February 2008, finalized in March and approved by Barbara Franco in April 2008.
2. The assessment tool was distributed to sites and museums in April for completion. Sites were asked to work with staff, Associates and other stakeholders to complete the assessment and make comments about management models.
3. Site assessments were completed by July 1 and placed in a secure computer location for comments before being submitted to Division Chiefs and the Bureau Director for review and questions. Revised assessments were re-submitted.
4. Division Chiefs met with site Associate group boards throughout the summer and fall of 2008. Notes taken from those meetings were also posted to the secure computer location.
5. A Sustainability Committee of peers from the Bureau was formed to review and comment on site assessments, and to develop draft recommendations for each site. The Committee visited and/or discussed three sites—Hope Lodge, Joseph Priestley House, and Conrad Weiser Homestead – to design a format for creating recommendations. This document is the report from the Sustainability Committee.
6. Concurrent with Sustainability Committee discussions, the Bureau Director met with PHMC's External Affairs Committee (Marketing Director, Legislative Liaison, Press Secretary) and with some legislators whose districts included historic sites and museums.
7. A visitor survey was also created to gather public input and placed on PHMC's website in December 2008. Survey information will be reviewed by the Sustainability Committee who will use it to revise individual site recommendations.

Next Steps

The next steps to Planning Our Future will be:

1. The Sustainability Committee will provide its final report with draft recommendations to the Bureau Director by the end of January 2009.

Planning Our Future

2. The Bureau Director will meet with Division Chiefs to further review and revise site scenarios and to develop final recommendations. The Bureau Director will meet with the Executive Director to review final recommendations for BHSM.
3. The Executive Director will present the final recommendations to the Commission at the March 2009 meeting.
4. Final recommendations will be approved and/or revised by the Commission.
5. Implementation plans will be developed based on the final recommendations.

The Work of the Sustainability Committee

“For sustainability and survival of museums, it could be argued that the most important standards are the public’s standards. Historic sites and museums need to meet audience needs, and visitors and users have different standards than the profession.”

- ‘The Impact of Standards on the Sustainability of Historic Sites’ by Katherine Kane, Forum Journal, Spring 2008.

The Sustainability Committee was developed as an independent review panel of BHSM staff, representing various areas of expertise throughout the Bureau. Three site administrators volunteered for the Committee—David Dunn, Administrator of the Railroad Museum of Pennsylvania; Barbara Zolli, Administrator of Drake Well Museum; and Russell Swody, Administrator of Conrad Weiser Homestead.

Three other Committee members were nominated by Division Chiefs to represent Bureau operational areas — Jeff Becker, Building Maintenance Foreman at Daniel Boone Homestead, representing maintenance interests; Mary Ellyn Kunz, Museum Educator at Pennsbury Manor, representing education/audience interests; and Jennifer Glass, Eastern Regional Curator, representing curatorial and collections interests.

Brenda Reigle, Chief of the Collections Care Section, who was involved in the creation of the sustainability process, was also added to the Committee. Dunn and Reigle were named Co-Chairs of the Sustainability Committee, which included a mix of small and large sites, as well as AAM accredited institutions (Pennsbury and Drake Well).

The Committee was charged with reviewing individual site assessments and commenting on assessments from other reviewers, along with notes from board meetings and background materials regarding attendance and finances. The Executive Director requested that three scenarios be developed for highest and best use of each site/museum, but, in some cases the Committee members saw fewer options or needs and developed two.

Planning Our Future

Committee discussions began with a review of each site's mission, the story(ies) told by that site and their relevance to the overall Pennsylvania story. The Committee spent much time in thoughtful discussion of potential ideas and carefully reviewed suggestions included by individual site staff in making their assessment responses.

The Committee met weekly from November 18, 2008 through January 20, 2009. After each meeting, Reigle wrote up Committee notes and scenarios for the sites as discussed. Division Chiefs and the Bureau Director reviewed and commented about the scenarios at their regular weekly meetings. These comments were sent back to the Committee to be included in revised site scenarios.

Top Bureau staff was kept informed of the Committee's work as it progressed. Steve Miller, Bureau Director, attended a portion of two Committee meetings and participated in discussion.

Site Scenario Recommendations

The final Committee-drafted scenarios for each site/museum are presented in alphabetical order in the following section of this report.

“By thinking beyond the traditional models, by opening the doors for unconventional experiences, and by welcoming the entire community, Brucemore has positioned itself to continue its relevance into the foreseeable future.”

- From 'Brucemore: A Cultural Center for Cedar Rapids' by James Kern, Forum Journal, Spring 2008.

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Introduction

Almost thirty years ago, the Pennsylvania Historical and Museum Commission adopted a plan entitled “New Departures” which effectively reorganized the Commission’s historic sites program. This plan was based upon recommendations from a “blue ribbon committee” of outside professionals working with PHMC staff. The result did much to revitalize and strengthen the Bureau of Historic Sites and Museums by consolidating its operating structure and making an assessment of its historic facilities based upon relevance to Pennsylvania history, condition and matching the resulting program with our resources. The plan effectively reduced the number of sites and museums that the bureau directly operated by half and has provided thirty years of stability to our program.

It is once again necessary to assess the PHMC’s historic holdings and to update the New Departures plan based upon anticipated resources, changing professional standards, economic realities and societal shifts. Building upon the success or limitations evidenced by the last thirty years of operation, the intent of this report is to provide a new blueprint for what will constitute a similar long term direction for the sites program. Following are the assessments and recommendations that have emerged during a year long study and review which suggest both short term and long term goals for each of the sites.

Planning Our Future

Brandywine Battlefield Park, located in Chadds Ford, Delaware County, preserves and interprets the Battle of Brandywine and its impact on the course of the American Revolution. The PHMC is assisted by the Brandywine Battlefield Park Associates, with a membership of 259.

Total visitation to Park programs in fy07-08 was 57,604, with an estimated 45,978 recreational and non-ticketed visitors and 11,626 paid admissions generating \$65,163 in program revenue.

The fy06-07 site operating budget was \$385,044 with PHMC providing \$235,601 including 3 full time and 6 part time positions and the BBPA providing \$149,442 including 4 part time positions.

Brandywine Battlefield

The Park is located on 52 acres in Chadds Ford Township, Delaware County and is part of the ten-square mile Brandywine Battlefield National Historic Landmark. The Landmark was designated the first Commonwealth Treasure in 1997. The site currently consists of three main areas of interpretation: (1) the Gideon Gilpin House and outbuildings; (2) Benjamin Ring House, a reconstruction opened to the public in 1952; and, (3) the Visitor Center, a small modern structure built in 1977 to resemble an area Quaker meeting House.

Recommendation:

The highest and best use of the site is as a local park and open space. Discontinue operating Brandywine as a staffed historic site and continue to maintain the site as a passive recreational park. In the short term; PHMC will continue to maintain the park. Steps should be taken to transfer the Park to a unit of local government, such as Chadds Ford Township, whose offices and meeting house are located directly across Route 1 from the Park. We anticipate that the Brandywine Associates group would continue to function as a non-profit, "Friends" group to provide a limited schedule of interpretation and programming during this transition period and for the future.

Planning Our Future

Located in Penn Township, Westmoreland County, Bushy Run Battlefield's primary mission is to interpret and commemorate Colonel Henry Bouquet's decisive victory over the Native American forces on August 5th and 6th, 1763. The PHMC is assisted by the Bushy Run Battlefield Heritage Society with a membership of approximately 200.

Total visitation to the Battlefield in fy07-08 was 27,629, with 24,276 recreational users and 3,353 paid visitors generating program revenue of \$11,729.

The annual operating budget for the Battlefield in fy06-07 was \$329,091 with PHMC providing \$279,491 including two full time and two part time employees and the BRBHS providing \$49,600.

Bushy Run Battlefield

Bushy Run marks the commemoration of a very important battle fought in August 1763 between the Native American tribes and the British as part of "Pontiac's rebellion." It occurred after the formal end of the French & Indian War but was really the last act in that struggle. As later development on this battlefield has been limited, the original terrain contours of 1763 are still discernable and are able to be interpreted. The park has a small visitor center in which an exhibit had been created about fifteen years ago. The real visitor experience at Bushy Run is the battlefield itself which today is only partially marked. Interpretive planning for Bushy Run has been to acquire land within the view shed of the visitor center area, which has been partially accomplished leaving a few areas on which the 1763 action is believed to have occurred still in private hands. At the same time the battlefield should be interpreted by wayside signs and a refurbishing of the present trail system. While the park also functions as a community resource, large portions of the battlefield which have been mowed do not need to continue to be landscaped.

Recommendation:

PHMC should discontinue operating the visitor center on a regular daily schedule and shift more direct responsibility for the park and its programs to the Friends of Bushy Run Battlefield and / or the town of Jeanette. The primary visitation to Bushy Run Battlefield is either local recreational users or visitors who can walk or wheel the battlefield itself. The visitor center and its exhibits are secondary to that experience. The battlefield signage plan needs to be implemented and trails cut and maintained to facilitate a tour of the battlefield without undue fear of ticks, snakes or other creatures which might inhabit tall grass. An assessment should be made with the local community to determine how much of the site is used for recreational activities and then continue to maintain those areas.

Planning Our Future

The Conrad Weiser Homestead, located in Womelsdorf, Berks County, preserves and interprets the life and contributions of Conrad Weiser (1696-1760), a pivotal figure in the development of colonial Pennsylvania's Indian policy. The PHMC is assisted in site operation by the Friends of the Conrad Weiser Homestead, with a membership of 128.

Total visitation to the Homestead's programs in fy07-08 was 14,017 consisting of 13,362 recreational and non ticketed visitors and 655 paid visitors generating program revenue of \$1,722.

The fy06-07 site operating budget was \$170,940, with PHMC providing \$155,852 including 1 full time and 2 part time positions and the FCWH providing \$15,088.

Conrad Weiser Homestead

The Conrad Weiser Homestead is located in Womelsdorf, Berks County, Pennsylvania which interprets the life of Conrad Weiser. Weiser was an 18th century German immigrant who served as an Indian interpreter and who helped coordinate Pennsylvania's Indian policy. He played a major role in the history of colonial Pennsylvania. The Conrad Weiser Homestead is located on Rt. 422, within easy driving distance of Philadelphia, Lancaster, Hershey and Harrisburg. The Conrad Weiser Homestead includes period buildings, and a new orientation exhibit on a 26 acre Olmstead – designed landscaped park.

Recommendation:

Discontinue operating Conrad Weiser Homestead as a staffed historic site and continue to maintain the site as a passive recreational and memorial park. Approximately 95 % of the current visitation to the park is recreational use. A recent Historic Structures Report concluded that the "Weiser House" is probably not the house where Weiser lived. That location is unknown. Interpretive outdoor signage would be sufficient to tell the important Weiser story and interpret the memorial park. It may be possible to further highlight Weiser's history with a special annual event at the site. Longer term, the Friends might be willing to partner with local groups to assume greater responsibility for the site. The current visitor center could be converted back into housing for rental purposes; it was lived in by a caretaker for many years. While the site has historical interest, it has negligible potential for growth or substantial increases in revenue streams.

Planning Our Future

Cornwall Iron Furnace, located in the village of Cornwall, Lebanon County, preserves and interprets the everyday operation of this 18th and 19th century blast furnace. The PHMC is assisted by the Cornwall Iron Furnace Associates with a membership of 148.

Total Visitation to the Furnace in fy 07-08 was 5,596 with 2,741 recreational and non-ticketed visitors and 3,629 paid visitors generating \$14,027 in program revenue.

The fy06-07 site budget was \$228,409 with PHMC providing \$201,110 including 2 full time and 1 part time positions and the CIFA providing \$27,299 including one part time employee.

Cornwall Iron Furnace

Cornwall Iron Furnace is an extraordinary example of the furnaces that dotted the Pennsylvania countryside in the 18th and 19th centuries. Around it developed villages, artisans' shops, stores, schools, churches, and the home of a wealthy ironmaster. All of the raw materials necessary for the smelting process – iron ore, limestone and wood for charcoal – were found in this self contained iron plantation, Cornwall Iron Furnaces, the only surviving intact charcoal cold blast furnace in the Western Hemisphere, attests to the once great iron industry that flourished in south central Pennsylvania. It is a National Historic Landmark site.

Recommendation:

Retain site as PHMC administered and operated property. Of the “small sites” Cornwall Iron Furnace has the highest paid visitation and most inherent integrity, and it has a vital, passionate support group. The buildings are historic jewels that offer a crucial story in Pennsylvania history. Staffing is sufficient at current level. Collection care can be handled by a regional curator or possibly a part time curator. The site is manageable from an operational perspective and has potential for additional revenue opportunities. It is highly regarded in the community and considered a hallmark historic site in the region. Seasonal and reduced hours of operation should be considered, possibly April through October with a Friday-Sunday open schedule.

Planning Our Future

Daniel Boone Homestead, located in Exeter Township, Berks County, interprets the settlement, development and culture of eastern Berks County, including the Oley Valley, during the period 1730-1808 through the experiences of the Boone, Maugridge and DeTurk families who occupied this site. The PHMC is assisted by the Friends of the Daniel Boone Homestead with 100-150 members.

Total visitation to the Homestead in fy07-08 was 71,722 with 64,811 recreational and non-ticketed visitors and 6,911 paid visitors generating \$29,719 in program revenue.

The annual operating budget for the Homestead in fy06-07 was \$443,561 with PHMC providing \$387,661 including 5 full time and 2 part time positions and the FDBH \$55,900 including 3 part time positions.

Daniel Boone Homestead

Daniel Boone's parents first settled the site in 1730 and the region was populated by English, Welsh, Scots-Irish, Germans, Swedes, Huguenots and Lenape Indians. Daniel was born here in 1734 and spent his first 16 years here before his family migrated to North Carolina. There is serious community interest in and use of Daniel Boone Homestead. However, the Friends group, while dedicated and passionate, are limited in their ability to increase revenue support to the site. They could become part of a larger partnership/stewardship entity for Daniel Boone Homestead's care and operations in the future. At present, revenue generated for the PHMC is only modest. Growth in this area has some potential but probably limited since numerous partnerships have already been formed. The property is 500 acres plus, and while the structures are in good condition, it is a large site to manage and requires significant grounds and structure care. The site serves as a valuable open space and park for area residents.

Recommendation:

Retain the site as fully administered and operated property for the time being. The "Daniel Boone House" is the birthplace of Daniel Boone; however, he lived there only as a youth, and the house has experienced considerable alterations over time. A recent historic structures report documents a segment of the original structure now integrated into the existing house, but young Daniel Boone did not live in the house as it now appears.

The site's main attractions are the diverse programs and the recreational use of the several hundred acres. Many of the programs involve the use of the property for horse back riding, lessons in orienteering, bird walks, Boy Scout camping, and other site operated outdoor events. Suggested changes to program include offering guided house tours on Saturday and Sunday only from April through October and instituting a grounds use fee that can capitalize on the many outdoor and recreational events and users.

Reduce the Commonwealth's property maintenance responsibilities by leasing or selling the Harcar and Pyle houses and lease more of the property to neighbors/partners for appropriate use. Long term, a cooperative relationship leading to a transfer to DCNR or to county or township ownership or operation should be explored.

Planning Our Future

Drake Well Museum, located in Titusville, Venango County, collects, preserves, and interprets the founding of the oil industry in Pennsylvania. PHMC is assisted in its operation by the Friends of Drake Well with a membership of more than 400.

Total visitation to Drake Well in fy07-08 was 33,827, with 17,783 recreational and non-ticketed visitors and 16,044 paid visitors generating \$32,516 in program revenue.

The annual operating budget for fy06-07 was \$940,650 with PHMC providing \$669,824 including 8 full time positions and the FDW providing \$270,826 including 1 full time and 4 part time positions.

Drake Well Museum is accredited by the American Association of Museums and also operates and interprets Pithole Visitor Center and McClintock Oil Well #1.

Drake Well Museum and Park

Drake Well Museum tells a story of state, national and international importance. It recently received reaccreditation from the American Association of Museums in recognition that it meets high standards of collections care, interpretation and educational programming. A major capital project is now underway to renovate the museum building and to upgrade its 1962 operating plant, wiring and layout. A new exhibit has been scripted and is now under design, using released capital funding supplemented by over \$1,000,000 of locally raised private funding. The size of this local supplement speaks to the success of the site in engaging the local, regional and international communities. While it is located far from any recognizable tourist route, its support and visitation has been most impressive.

Recommendation:

PHMC should continue to maintain and operate the site. In addition to its historical interpretation and programs, the site also has an impressive local recreational use component which is acknowledged, but not part of current planning. It is recommended the site make better use of its recreational potential. This might include promoting and charging for use of the grounds for family gatherings and other group events beyond individual picnickers. It is recommended that the Friends create a facilities and volunteers coordinator to explore and expand these uses.

Eckley Miners' Village, located near Hazleton, Luzerne County, preserves and interprets the everyday life of miners and other mining company employees in a culturally, ethnically and economically diverse company-owned anthracite mining community or "patch town." The PHMC is assisted in its operation by The Eckley Miners' Village Associates with 325 members. The total visitation in fy07-08 was 17,764 including 5,334 non-ticketed visitors and 12,430 paid visitors generating \$50,466 in program revenue.

The annual operating budget for the Village in fy06-07 was \$761,720 with the PHMC providing \$672,220 including 8 full time and 3 part time positions and the EMVA providing \$89,500 including 4 part time positions.

Eckley Miners' Village

Eckley Miners Village is a unique example of a patch town that thrived in the anthracite region during the industrial revolution. It is the only preserved company town of its type. The site has over 100 structures and is in the third phase of a capital project to stabilize the miners', doctors' and other houses that comprised the town of Eckley. Nearing completion, the exterior of many of the remaining structures have been stabilized and some have been restored. However, there remains a great deal of work to be done to the interiors of the houses and decisions must be made about their ultimate use. Eckley is unusual because it has always been and continues to be a residential community as well as a historic site. At present 18 are exhibit buildings and 16 are rented to tenants. 26 are vacant. The site's visitation has increased and revenue potential exists, however, this is a large, maintenance intensive site that will continue to demand funding for preservation maintenance for years.

Recommendation:

PHMC should continue to administer and operate this historic site, but there are several options that PHMC should consider as a means to preserve the site and maintain the popular programs while reducing expenditures. The ratio of interpreted historic buildings to occupied residential buildings should be reviewed. Considerations include: review site rental rates and develop a schedule to increase them; develop a Resident Curator program for a number of houses; partner with Habitat for Humanity or similar organization to restore buildings, work with local Vo-Tech schools to teach building trades, or explore area historic preservation/ trades preservation programs; explore small businesses—such as artists, craftspeople, shops or lunch facilities; seek architectural firms willing to develop a model community (perhaps with a 'green' theme) and willing to promote historic preservation and re-adaptive use; explore the option of tax credits for persons willing to restore/ preserve Eckley structures. Interpretive programs should also be reviewed.

A seasonal operation for the site - April through October and reduce daily schedule to Wednesday through Sunday - is recommended. The site should focus on group tours and special events to build attendance. The Associates group involves strong community support and participation in events. Their primary focus has been to restore the reproduction coal breaker built for the set of the Molly Maguires film. PHMC's priority has been the preservation of the remaining historic structures.

Planning Our Future

Ephrata Cloister is a third time accredited site by the American Association of Museums. Of the 16,000 museums in the U.S. only 4% have sustained this level of excellence in achieving best practices and standards.

Located in the Borough of Ephrata, Lancaster County, Ephrata Cloister preserves and interprets this 18th-century religious community. The PHMC is assisted in its operation by the Ephrata Cloister Associates with a membership of 475.

The total visitation for fy07-08 was 23,212 with 5,590 recreational and non-ticketed visitors and 17,622 paid visitors generating \$108,130 in program revenue.

The fy06-07 operating budget was \$769,866, with PHMC providing \$587,896 including 7 full time and 2 part time positions and ECA providing \$181,970 including 1 full time and 6 part time positions.

Ephrata Cloister

One of America's earliest religious communities, the Ephrata Cloister was founded in 1732 by German settlers seeking spiritual goals rather than earthly rewards. Gathered in unique European style buildings, the community consisted of celibate Brothers and Sisters, and a married congregation of families. At the zenith of the community in the 1740's and 1750's about 300 members worked and worshiped at the Cloister. The historic structures are unique in the U.S.; the historic story exemplifies William Penn's "holy experiment" of religious tolerance in Pennsylvania. The site is a cultural icon with numerous firsts: fraktur in America; original American music; Printing of the largest book in colonial America, and the like. It is a National Historic Landmark.

Recommendation:

Retain site as fully administered and operated PHMC property. The primary subject matter of religion is universally relevant and has been for thousands of years. Site has potential for more revenue through increased facility rental of amphitheater and Saal; eligibility for major federal and other grants; increased partnerships such as dinner tours and evening hours; additional programs. The site has one of the longest established Associates groups (50 years in 2008) who have poured hundreds of thousands of dollars back into the program. Consider changing operating hours from 8:30-5 to 9-6 and 9-7 on Saturdays in summer. Site has popular and diverse programs and the potential for more.

Planning Our Future

The mission of the Erie Maritime Museum and the U.S. Brig Niagara is to collect, preserve, document and interpret the maritime contributions of Erie to the development of the Commonwealth, including the Lake Erie Campaigns of the War of 1812. The PHMC is assisted in operating the site by the Flagship Niagara League with a membership of 479.

Total fy07-08 visitation for the Museum was 25,679 with 3,317 in recreational and non-ticketed visitors and 22,362 paid visitors generating \$85,544 in program revenue.

Total fy07-08 visitation for the Flagship was 15,267, with 14,521 non-ticketed visitors and 746 paid visitors generating \$39,940 in program revenue.

Total fy06-07 operating budget for the Museum/Flagship Niagara was \$1,348,293 with the PHMC providing \$406,377 including 4 full time and 1 part time positions to the Museum program and \$469,306 to the Flagship Niagara program. The FNL total fy06-07 operating budget was \$472,610 including 3 full time and 1 part time positions

Erie Maritime Museum/Flagship Niagara

The Commonwealth has made a considerable investment in the rebuilding of the US Brig *Niagara* and the creation of the Erie Maritime Museum. The local support and revenues that were anticipated to help run both the ship and its sailing program and the museum have not materialized, leaving the Commonwealth supporting the operation of both programs over the past twenty five years. The sailing program has evolved a schedule of port visits around the Great Lakes that brings in port fees. The *Niagara* has been approved by the Coast Guard as a “sailing school vessel” but this program has not attracted sufficient numbers of students to improve the cash flow. The maintenance and sailing of the *Niagara* costs about \$1,000,000 per year and when the ship is away from port, the visitors board the ship in places like Chicago and Duluth rather than in Pennsylvania. Efforts to involve the Erie community in fundraising have not been successful, leaving the *Niagara* as a state-funded program. The Erie Maritime Museum was developed as part of the waterfront redevelopment and shares space with the Public Library. It has a well-designed facility, good interpretive exhibitions and already receives considerable visitation. It has potential to expand its role in the community as a tourism destination and an educational resource.

Recommendation:

Because there are significant costs involved in sailing the *Niagara*, additional funding from the Erie community or a for-profit partnership would be necessary to continue the current sailing program. In the short term, the recommendation is to discontinue the sailing program, keep the ship docked in Erie and allow visitors aboard as part of the museum tour. This will allow some resources to be redirected to the museum and its programs, but the *Niagara* will still require ongoing maintenance.

The Erie Maritime Museum needs additional resources and staff to achieve its mission and potential. The museum is preparing for the Bicentennial of the War of 1812 with plans to revise the permanent exhibits and museum entrance and expand changing exhibitions and programs. It is hoped that the Niagara League will be willing to refocus its operating vision from sailing the ship and visiting other ports to playing an active role in the development of the Erie Maritime Museum and its outreach educational programs as a valuable resource for the community.

Planning Our Future

Fort Pitt Museum

Fort Pitt Museum, located in Point State Park in downtown Pittsburgh, interprets the strategic importance of the “Forks of the Ohio” during the French and Indian War period and the founding and early development of the City of Pittsburgh. The PHMC is assisted by the Fort Pitt Museum Associates with a membership of less than 40.

Total visitation for fy07-08 was 10,533 including 1,978 non-ticketed visitors and 8,575 paid visitors generating \$24,324 in program revenue.

Operating budget for fy06-07 was \$512,162 with the PHMC providing \$504,041 including 5 full time and 5 part time positions and the FPMA providing \$8,121.

Fort Pitt Museum was created as part of a 1950s plan to revitalize center city Pittsburgh through the creation of an urban history park dedicated to the early years of Pittsburgh’s history prior to 1800. The museum, as built, occupies one recreated bastion of the original Fort Pitt and opened to the public in 1968. Over the years it has been beset by physical and operational difficulties. The museum has been flooded twice when the waters of the three rivers overwhelmed the park requiring extensive renovations each time. The museum was built as part of the Fort Pitt Bridge whose common girders have created areas where water can seep in damaging the ceiling of the museum and endangering its collections. Through considerable effort by PHMC these situations have been largely addressed. A second floor gallery was constructed to avoid the flood and leak zones and now houses an excellent introductory exhibition on the history of the fort site and its role in the French and Indian War. The second floor gallery has also freed additional educational or visitor center space on the first floor. Despite these improvements, the museum has still not achieved visibility within the park or the Pittsburgh museum community. During construction projects at the building and more recent renovations in the park accessibility to the museum was severely limited.

Today, other museums in the Pittsburgh area also interpret the story of the French and Indian War. The new Pittsburgh History Center has created exhibits covering the early history of Pittsburgh and Fort Ligonier, some fifty miles away, also tells the story of the French and Indian War. Key Pittsburgh related artifacts story were transferred by the Carnegie Museum to the History Center and funding initiatives have resulted in an impressive new exhibit at Fort Ligonier. The DAR operates the Fort Pitt Block House on the grounds of Point State Park directly opposite the museum. The PHMC, working with a state capital appropriation, has created a really fine exhibit in the newly created upper floor of the museum, drawing upon the State Museum of Pennsylvania’s excellent 18th-century military holdings as a resource supplemented by small local grants and an endowment.

As Point State Park has matured, new forces guiding the park have revised Point State Park’s historical interpretation approach to more active use of the park for concerts and events downtown. These events had a negative impact on the park’s infrastructure and often relegated the museum’s role to that of “restroom.” Efforts began ten years ago to reposition Point State Park as part of the city’s 250th anniversary. A plan that took into consideration the historical, recreational and natural aspects of the history park has resulted in much needed revamping of the physical park, but has done little to

Planning Our Future

redefine or expand Fort Pitt Museum's role within the park's overall scheme. While the presence of the museum is acknowledged as an amenity, Fort Pitt remains marginal to the park's funding and renovation plans. The absence of signage to lead visitors to the museum resulted in paid visitation for last year of only 8575. PHMC has repeatedly suggested that a portion of the now vacant first floor could be developed as a park visitor center but no support for this idea is available and any action would probably be years away.

Recommendation:

Point State Park's developing interpretive plan indicates that the park will tell the story of Pittsburgh's founding through exterior signage. The museum facility and its present program, while pleasant add-ons, are not necessary to the park's essential function. Since two other major institutions close by also tell the same story as Fort Pitt Museum, it is recommended that PHMC close Fort Pitt Museum and remove the artifacts, the building should be offered to DCNR for use as a visitor center and park offices. The upstairs exhibit can be maintained by DCNR as part of the visitor center. With the Pittsburgh History Center now covering the early history of Pittsburgh in its own exhibits, those artifacts which were purchased for Fort Pitt with local funding could be lent for use to that facility or to Fort Ligonier. The museum building could continue to house the office of the Fort Pitt Blockhouse, a DAR facility, located next door to the museum

Planning Our Future

Graeme Park, located in Horsham, Montgomery County, preserves and interprets the significant architecture of this 18th century country estate, built by Sir William Keith and later occupied by Thomas Graeme. PHMC is supported in site operations by the Friends of Graeme Park with 56 members.

Total visitation in fy07-08 was 8,005 with 4,591 paid visitors generating \$45,721 in program revenue and 3,414 recreational and non-ticketed visitors.

Total fy06-07 operating budget totaled \$59,644 with PHMC providing \$24,110 including 1 shared full time position and FGP \$35,534 including 1 part time position.

Graeme Park

Graeme Park is the 18th Century home of Sir William Keith, Provincial Governor of Pennsylvania from 1717 to 1726, and a contemporary of Benjamin Franklin. After Keith's removal due to disputes with Hannah and Springett Penn and the Provincial Council the property was sold. A son-in-law of Governor Keith, Dr. Thomas Graeme, purchased the property in 1739. A prominent physician who was the Port Physician of Philadelphia from 1727-1741 and a co-founder of Pennsylvania Hospital with Benjamin Franklin, Dr. Graeme may be best known as the father of Elizabeth Graeme Fergusson who became a significant figure in women's history and literature. The site has a documented legacy as a plantation powered by enslaved Africans.

Recommendation:

The highest and best use is to continue full PHMC operation of Graeme Park. The Park has significant support from a strong friends group and has a number of well attended public programs. It is significant as an early slave-powered plantation north of the Mason Dixon line. It is a National Historic Landmark and was studied heavily during the New Deal Era with HABS drawings. The Keith House is in excellent condition and is a true icon to the supportive community.

Planning Our Future

Hope Lodge, located in Fort Washington, Montgomery County, preserves an outstanding example of Georgian architecture built for Samuel Morris and interprets the lifestyles of the site and surrounding community during the 18th century Colonial and early 20th century Colonial Revival periods. PHMC is assisted in operating the site by Friends of Hope Lodge and Mather Mill with a membership of 71.

Total visitation for fy07-08 was 3,302 with paid visitation of 1,441 generating \$16,812 in program revenue and 1,861 recreational and non-ticketed visitors.

Total fy06-07 operating budget was \$219,015 with the PHMC providing \$199,584 including 1 shared full time, 1 full time and one part time positions and the FHLMM providing \$19,431.

Hope Lodge

An excellent example of early Georgian architecture, Hope Lodge was built between 1743 and 1748 for Samuel Morris, a prosperous Quaker. During the American Revolution's Whitemarsh Encampment George Washington's Surgeon General, John Cochran, used the house as headquarters. The Continental Army camped in the surrounding fields for six weeks following the Battle of Germantown. From there, the Army moved on to Valley Forge. It is interpreted as an example of both 18th century Colonial and early 20th century Colonial Revival interior design and furnishings. Any consideration of changes to Hope Lodge's PHMC operation will need to begin with a review of conditions related to the transfer of the property to the Commonwealth, including conditions of the Degn Trust endowment.

Recommendation:

Continue to operate Hope Lodge and Mather Mill for the time being, but begin to explore alternatives. Options to consider include: lease or sale with restrictive covenants as a headquarters for a small business or local or community non-profit organization; lease or sale of the tenant house, barn and surrounding land. Depending on the organization, the Friends of Hope Lodge might continue to provide educational and public programming. Another alternative is to explore a Resident Curator Program where a private individual or family leases the building and grounds with covenants and contracts to perform all maintenance according to the standards of the secretary of the interior with the Degn Trust revenue being allocated for major maintenance.

Planning Our Future

Joseph Priestley House, located in the Borough of Northumberland, Northumberland County, preserves and interprets the contributions and significance of Joseph Priestley. Priestly lived and practiced chemistry in Northumberland, Pennsylvania from 1794 to 1804. PHMC is assisted in the operation of the site by the Friends of Joseph Priestley House, with a membership of 82.

Total visitation in fy07-08 was 1,705 with a paid visitation of 1,100 generating \$4,125 in program revenue and 2,406 recreational and non-ticketed visitors.

Total fy06-07 operating budget \$142,901 with PHMC providing \$136,001 including 2 full time positions and FJPH providing \$6,900.

Joseph Priestley House

As a National Historic Landmark and National Historic Chemical Landmark, the site features Priestley's manor house with its laboratory wing situated along the North Branch of the Susquehanna River at Northumberland, Pennsylvania – the small town Priestly called home from 1794 -1804. Priestly is also significant for his role in Unitarianism.

Recommendation:

PHMC should discontinue operation of the Joseph Priestley House as a historic site/house museum because of the low visitation and limited potential for growth. The Priestley story could be told elsewhere—at the State Museum of Pennsylvania, for example. One possibility is to arrange with the Friends to enter into a management agreement in partnership with the American Chemical Society and Penn State University. Another possibility is to lease the property or establish a Resident Curator arrangement for someone who would live there and take care of the property.

Planning Our Future

Located in Manheim Township, Lancaster County, The Landis Valley Museum collects, preserves and interprets the history and material culture of the Pennsylvania German community from 1740-1940. PHMC is assisted by the Landis Valley Associates with a membership of 600.

Total visitation for fy08-09 was 63,924 with 37,855 recreational and non-ticketed visitors and 26,069 paid visitors generating \$375,778 in program revenue,.

Total operating fy06-07 budget was \$1,991,331 with the PHMC providing \$1,191,333 including 16 full-time and 4 part-time positions and the LVA providing \$800,000 including 5 full-time and 45 part-time positions.

Landis Valley Museum

Landis Valley Museum portrays the history of an early Pennsylvania German settlement, an unusual farm family and the ongoing creation and exploration of a diverse collection of artifacts numbering near 70,000. When brothers Henry Kinzer Landis and George Diller Landis opened the museum in 1925 at their Landis Valley residence, the area had been a small Pennsylvania German settlement since the mid 1800s. Visitors experience 18th and 19th century village and farm life in Lancaster County, Pa. With over 100 acres and 65 buildings the site is highly programmed with living history. Part of the site is on the National Historic Register for "National Significance." It has been recognized with national awards several times over the years and has "appeared" on National Public Radio, the NY Times, National Geographic, Good Morning America, Voice of America and was the subject of two days of the "Today Show." It is the second highest paid visitation site and the second highest revenue producing site in the PHMC. It is in the 8,400,000 tourism market in Lancaster County.

Recommendation:

PHMC retain Landis Valley Museum as a fully administered and operated museum. The historic story of Pennsylvania German rural life and culture is central to Pennsylvania's story and colonial America's story. The collections are deep and rich and the programs are substantive and popular. The community recognizes Landis Valley Museum as its cultural birthright and has provided opportunities for LVM to be a major player at the table in the PA Dutch Convention and Visitors Bureau and other cultural and economic promotional organizational including agricultural groups.

The Board of Directors of the Landis Valley Associates is among the most savvy and sophisticated boards of PHMC Friends groups. They understand their fiduciary responsibility and have generated a level of direct corporate support for the museum that is a model among PHMC sites and museums. Visitation has grown and facility rentals continue to bring in significant revenue even in the current economic climate. The Yellow Barn is booked every weekend in 2009. While this is a large site with 65 buildings and 100+ acres, there is an opportunity to reduce the acreage and consider some buildings for alternative use such as rental or Resident Curator.

Planning Our Future

Located in the Borough of Ambridge, Beaver County, Old Economy Village interprets the history of the Harmony Society and preserves and interprets the unique material culture of the Society during its period of residence in Beaver County. The PHMC is assisted by the Friends of Old Economy Village with a membership of 204.

Annual visitation in fy-07-08 was 23,573 including 14,609 recreational and non-ticketed visitors and 8,964 paid visitors generating \$28,303 in program revenue.

The total fy06-07 operating budget was \$1,237,193 with the PHMC providing \$1,096,797 with 13 full-time and 3 part-time positions and the FOEV providing \$140,396 including 3 part time positions.

Old Economy Village

This is the PHMC's first site and one of its most frustrating. Old Economy is a National Historic Landmark and one of a very few sites in the United States with a majority of its original furnishings still on site from its historical period during the second quarter of the 19th century. The Commonwealth has had multiple capital projects at OEV in recent years resulting in the creation of a new visitor center, new exhibits and a gradual reworking of the buildings and landscape on site. The historic site property exists within the town created by the Harmonists that later became an industrial steel town and has been trying to revitalize itself over the past thirty years—without success. While Ambridge is not a distressed area, it is lower middle class both fiscally and in attitude and has shown limited interest in partnering with OEV on any meaningful basis. It is an expensive site to operate. The security needs of covering the site in the evening because of reputed drug deals and a real case of arson have also increased costs.

Recommendation:

PHMC should keep and maintain the site with a renewed emphasis on the guest and the guest experience. Marketing to visitors on a regional rather than a local basis has met with some success. The site is 16 miles north of Pittsburgh, but over the Allegheny County line in Beaver County. Much of its support over the years has been from Sewickley or Beaver Falls. While there has been considerable investment in collections management and architectural preservation, the site needs a formal assessment of its mission and audience research, including a MAP III. As potentially the only PHMC site in the Pittsburgh area, it is recommended that the site do more to participate in audience building and community relationships.

Planning Our Future

Located along the Delaware River in Morrisville, Bucks County, Pennsbury Manor preserves the reconstructed 17th century home of William Penn and interprets the values and achievements of Pennsylvania's founder and preeminent statesman. The PHMC is assisted in site operations by the Pennsbury Society with 150 members.

Total fy07-08 visitation was 27,568 with 7,419 recreational and non-ticketed visitors and 20,149 paid visitors, generating \$156,418 in program revenue.

The fy06-07 operating budget was \$1,024,227 with the PHMC providing \$724,227 including 8 full-time and 4 part-time positions and the PS providing \$400,000 with 9 part time positions.

Pennsbury Manor is accredited by the American Association of Museums.

Pennsbury Manor

Pennsbury Manor is one of the four accredited PHMC sites. Its recreation is the result of significant work by the Works Progress Administration in the 1930s when archaeologists studied the site. Since that time the site had been turned into a complex of recreated buildings and gardens that carefully represent the Manor of William Penn. The site has a new visitor center and a capital exhibit project that is nearing installation.

Recommendation:

Retain Pennsbury Manor and operate as a fully functioning PHMC museum. It has strong school visitation, a Board of Directors with a good sense of fiduciary responsibility and one of the clearest mission related programs within the agency. As it develops its adult programming it deserves full support for its future.

Planning Our Future

Located in McDade Park, Scranton, Lackawanna County, the Anthracite Heritage Museum preserves, documents, and interprets the evolving heritage of the people who lived and worked in Pennsylvania's hard coal region. The PHMC is assisted by the Anthracite Heritage Museum and Iron Furnaces Associates with 350 members.

Total fy07-08 visitation was 18,297 with 4,133 recreational and non-ticketed visitors and 14,164 paid visitors generating \$51,180 in program revenue.

The fy06-07 operating budget was \$543,497 with the PHMC providing \$417,071 including 4 full-time and 2 part time positions and the AHMIFA providing \$126,426 including 1 full time and 2 part-time position.

Pennsylvania Anthracite Heritage Museum

The Museum tells the story of the people from European countries who worked in the anthracite mining and textile industries. The diverse collection highlights life in the mines, mills and factories.

Recommendation:

PHMC retain Anthracite Heritage Museum as a fully administered and operated museum.

The museum's mission is strong and has relevance in the 21st century: the story of people, immigration, variable economic times, ethnicity; work and labor relations, and technology. In short, its themes and mission are timeless and appealing. There is growing community interest and support in the artifacts and the archival collections. There is real potential to develop a partnership with a local university to manage the library and archives. There is also an initiative underway to create a joint ticketing arrangement with the Mine Tour which would increase foot traffic and revenue to the museum. Built in 1975, the building infrastructure is healthy and has realized recent upgrades. From a financial standpoint, it is manageable and cost efficient. Since visitation is comprised of numerous popular programs and daily visitors, the operating schedule could be rearranged to provide more open hours in the peak visitation season. Consider opening April-October, Wednesday-Friday but remaining open until 6 PM on Saturday night in July and August.

An alternative management arrangement should be considered for the Scranton Iron Furnaces. Interest in management of the Furnaces has been expressed by the city, county, and others.

Planning Our Future

Located near Galeton, Potter County, the PA Lumber Museum preserves and interprets the history, importance, and aesthetics of Pennsylvania's forest resource. The PHMC is assisted by the PA Lumber Museum Associates with a membership of 414.

Total fy07-08 visitation was 11,224 with 2,633 recreational and non-ticketed visitors and 8,591 paid visitors generating \$41,711 in program revenue.

The fy-6-07 operating site budget was \$276,301 with PHMC providing \$235,341 including 3 full-time and 2 part time positions and the PALMA providing \$40,960 including 2 part-time positions.

Pennsylvania Lumber Museum

The Pennsylvania Lumber Museum enjoys the status of being the only museum in the area. It has developed a strong relationship with DCNR through such entities as Pennsylvania Wilds, the Hardwoods Council, the Lumber Heritage Region and the Governor's Route 6 initiative and with the businesses and members of its local community. It has recently received the release of \$5.2 of the \$6.4 million dollars appropriated to host an all purpose community room and to revamp the partial exhibits installed about 1970. It is one of the most recent of the museums opened in the PHMC museum building program from 1962 – 1972.

Recommendation:

The Lumber Museum has created an impressive presence in state and PHMC planning initiatives and will shortly receive its new community space, now under design through DGS. Community partnerships need to be carefully monitored to insure that the Lumber Museum continues to play a lead role in the interpretation of the Potter County area and its development as a heritage tourism destination.

Planning Our Future

Located in Harris Township, Centre County, the Pennsylvania Military Museum preserves and honors Pennsylvania's military history from 1747 to the present. The PHMC is assisted in site operations by the Friends of the PA Military Museum with 110 members.

Total fy07-08 visitation was 126,451 with 118,620 recreational and non-ticketed visitors and 7,831 paid visitors generating \$25,420 in program income.

The fy06-07 operating site budget was \$437,923 with the PHMC providing \$383,223 including 6 full-time and 2 part-time positions and the FPMM providing \$54,700 including 1 part time position.

Pennsylvania Military Museum

This facility has grown out of the 28th Division Shrine originally placed privately by returning WWI veterans. The PHMC received this site in the 1960s and created a military museum which opened in 1968. The building has recently been completely reconfigured and a temporary exhibit has now been created pending the planning and fabrication of a new exhibit capially funded at 4.2 million dollars. The grounds of the museum are used by the community and veterans groups for special events.

Recommendation:

Retain as fully operational PHMC facility.

The museum's comparative low paid visitation of 7831 can be partially explained by the lack of a permanent exhibit. However, while the facility has overall enjoyed a close relationship with the Pennsylvania National Guard, it lacks a real liaison with the veteran community. Programs include lecture series and the site hosts a major art show. Now that a grounds use policy has been approved, other activities can be invited to utilize appropriate portions of the grounds.

The Military Museum enjoys a good relationship with the State College community, many of whom use its outdoor facilities but it needs to capitalize on opportunities for additional community partnerships, private fund raising and relationships with Pennsylvania veterans organizations.

Planning Our Future

Located in Strasburg Township, Lancaster County, the Railroad Museum of PA collects preserves and interprets Pennsylvania's railroad heritage. The PHMC is assisted at the site by the Friends of the Railroad Museum with 2,019 members. Total f07-08 attendance was 135,421 with 44,419 recreational and non-ticketed visitors and 91,002 paid visitors generating \$545,705 in program revenue.

Total fy06-07 operating site budget was \$1,793,192 with PHMC providing \$991,680 including 13 full time and 4 part time positions and the FRM providing \$801,512 including 5 full-time and 4 part-time positions.

The Railroad Museum has completed a Self Study and is awaiting accreditation peer review by the American Association of Museums.

Railroad Museum of Pennsylvania

The Railroad Museum of Pennsylvania was established in 1963 to serve as the commonwealth's official museum of railroading. The site in Strasburg was selected over other locations as a steam-powered, tourist line was already in operation. The core of the Museum's collection was a group of 23 locomotives and railcars of the Pennsylvania Railroad. This unique and important collection was moved to the Museum site in 1968 and opened to the public in 1975. The Friends of the Railroad Museum recently celebrated its 25th anniversary.

Recommendation:

Retain at full operational level.

Due to its strategic location in Lancaster County's tourism market and situated across the road from the Strasburg Railroad, the Railroad Museum is PHMC's most highly visited field site. It is a manageable facility utilizing extensive volunteers for preserving the collections.

With additional investment and continued marketing this site could become even more successful and it might be possible to delegate more operational responsibility to the Friends as outlined in the Business Plan that was prepared and submitted in the fall of 2008.

Planning Our Future

Located in Somerset Township, Somerset County, the Somerset Historical Center interprets the everyday rural life of southwestern Pennsylvania from its earliest settlement through the mid 20th century. The PHMC is assisted with site operation by the Historical and Genealogical Society of Somerset County, with a membership of 762.

Total fy07-08 visitation was 15,189 with 5,919 recreational and non-ticketed visitors and 9,270 paid visitors generating \$46,431 in program revenue.

Total fy06-07 operating budget was \$555,937 with PHMC providing \$371,138 including 4 full-time and 2 part-time positions and the HGSSC providing \$184,799 including 2 full time and 1 part time positions.

Somerset Historical Center

Somerset is a successful example of a public private partnership to create and operate a regional history center focusing on the rural and agricultural history of the Somerset County area. The county historical society owns acreage surrounding the PHMC built and maintained visitor center. The site has a paid visitation of 9270. The Somerset County Historical Society provides over one third of the total operating budget of the site and pays the salaries of the curator and two other positions. The director paid by PHMC coordinates all programs on the site.

Recommendation:

The complex has proven to be a very strong institution in its present configuration and no recommendations for change are made.

The site also hosts the Western Regional Educator whose activities over the years have been very useful to the bureau in developing surveys and interpretive planning for all PHMC sites. Additionally, the Bureau has been putting a premium on the audience research and community relevance of our sites as well as the development of new audiences. What limited efforts we have been making have all worked through the Western Regional Educator position.

Washington Crossing Historic Park

Located along the Delaware River in Bucks County, Washington Crossing Historic Park preserves and interprets the site at which General George Washington planned and executed his daring and successful crossing of the Delaware River on December 25, 1776. There is no Associate group currently assisting with site operation.

Total fy07-08 visitation was 316,052 with 288,282 recreational and non-ticketed visitors and 27,770 paid visitors generating \$90,809 in program revenue.

Total fy06-07 site operating budget was \$904,731 including 13 full time and 3 part time positions.

Washington Crossing Historic Park commemorates one of the most dramatic and important turning points in American History. The park is divided into 2 parcels, an upper and lower park, totaling approximately 560 acres located about 4 miles apart in 2 different townships. The site includes 250 acres of mowed park land, 2 sewage treatment plants, water systems, 50 individual buildings, extensive collections and responsibility for miles of roads and suburban streets. Bowman's Tower, a popular tourist destination in the upper park has had maintenance issues including repair of its elevator. The Soldiers Graves are a revolutionary war cemetery. The Bowman's Hill Wildflower Preserve is currently operating the preserve and seeking to take ownership of the property. Much needed renovations scheduled for the Visitor Center located in the lower park have been delayed and it is now in such poor condition that it has become necessary to close down the facility until those renovations can be completed. The site's ability to focus on its mission to interpret the important historical event that makes it an icon of national history is seriously compromised by the day to day issues of managing a large and very complex inventory of features and buildings without adequate staff or funding.

Recommendation:

PHMC should concentrate its interpretive resources on the Visitor Center and approximately 25 acres of the lower park. The Commission should also retain the lower park maintenance building and sewage treatment plant. The Visitor Center should be closed until a capital project to renovate the building can be completed. Other areas and features of the park should be considered for transfer to other public entities, alternate management or other ownership. The Bowman's Hill Wildflower Preserve is already interested in taking ownership of that site. The Thompson Neely House, Thompson Neely Mill, Victoria Neely House, Andrassy House should be leased, sold or managed in a Resident Curator arrangement. PHMC should partner with Bureau of Forestry, DCNR to manage woodlands, trails and picnic areas. Bowman's Hill Tower should continue to operate, preferably under the management of a non-profit or other entity. In the lower park, the Valley of Concentration and soccer fields should be transferred to the Township along with the residential roads that PHMC currently maintains.

A more detailed operational plan is being developed to guide the closure of the Visitor Center and reduced programming at the site until the capital project is completed. The Christmas Day Crossing event will be continued.

General Recommendations for the Bureau of Historic Sites and Museums

Based on ideas included in individual site assessments and on its discussions, the Committee has developed the following recommendations for the Bureau as a whole. The Committee believes that recommendations made for the Bureau will help achieve future success of operations in spite of shrinking resources and shifting museum and historic site paradigms.

CRITICAL AREAS

The Committee believes that the following “critical” areas should be considered for **major** focus as BHSM looks to the future. If priority is given to these critical areas in ways that provides meaningful and significant change, we believe the Bureau will become more adept at serving the revised needs of sites and the public.

Development

A nearly universal comment expressed in site assessments was the need to find more resources outside of the state system in order to successfully operate our sites and museums. The Committee also discussed ideas for addressing fundraising and development beyond looking for more community connection and support as noted below (see Relevance).

Recommendations:

- a. Consider having a regional person or someone in the Bureau office devoted to helping sites identify new funding sources, develop boilerplate information for grant proposals, and coordinate site fundraising efforts. This person could make connections when several sites and their partners outside PHMC look at applying to the same funding source. Many funding organizations like partnerships to maximize their “bang for the buck.”
- b. Coordinate more closely with the Heritage Society regarding fundraising, by sharing information about current grant proposals and funding resources.
- c. Local site fundraising success should be noted and promoted locally because connections with one community organization often lead to others by raising site awareness to local audiences. By share fundraising success stories with legislators, PHMC can raise their awareness of community activity in their districts.
- d. Consider merging endowment funds from a number of sites to develop a larger investment capital amount. Interest from this “merged” endowment would be apportioned according to the percentage of initial investment made by a specific museum.

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- e. Require that a percentage of money raised for projects will go toward an endowment either devoted to maintain that project or for general site operations. Although more money will need to be raised initially, this will provide for future sustainability. Decisions about who will manage the endowment and decide if and how dividends will be spent should be standardized.
- f. Compile a list of site facility use fees for other sites to use as comparisons.

Relevance

BHSM must place renewed focus on making our sites more relevant to their local communities and audiences. Being a good neighbor who is responsive to community needs will help provide regional sustainability for our sites and museums.

Recommendations:

- a. Audience research is critical to becoming relevant to the community. Sites should develop and use audience surveys as part of interpretive and program planning to determine what the public wants and needs. BHSM should consider doing a system-wide audience research/MAP III type of project (for those sites which don't already have this information) through one of the existing exhibit contracts.
- b. Beyond existing audiences, sites need to research, identify and cultivate NEW audiences in keeping with changing demographics.
- c. BHSM should review site mission statements and interpretive plans to assess what we are doing, why we are doing it and for whom. Develop a BHSM vision statement that is short, to the point and memorable.
- d. BHSM's sites and museums tell many interesting stories that can be enlivened and made more relevant by making more connections to a 21st century audience.
- e. Implement the use of some modern technologies, such as podcasts, cell phone tours, and other means, to help reach new and specific audiences.
- f. Sites and museums should focus on providing good experiences for our guests.

"One of the most striking changes in the composition of America since 1984 has been the dramatic expansion of the minority population... If museums want to remain relevant to their communities, the museum audience will have to look dramatically different as well."

*--Center for the Future of Museums paper, "Museums & Society 2034: Trends and Potential Futures"
Version 1.0, December 2008.*

Marketing

Universally, site assessments called for more marketing. Using some of the money that will be earned by increased admission rates is a good start toward increasing the marketing efforts of the Commission. Marketing research is the solid foundation upon which good, effective marketing is based and will pinpoint the most effective use of marketing dollars.

Planning Our Future

“According to research by the Institute of Museum and Library Services, 43% of museum visits in 2006 were remote, predominately via museum websites.... we’re seeing an emerging structural shift where technology is fundamentally enabling and wiring expectations differently, particularly among younger audiences...”

*--Center for the Future of Museums paper, “Museums & Society 2034: Trends and Potential Futures”
Version 1.0, December 2008.*

“Start with a blog. Then start three other social media sites: Twitter, LinkedIn, Facebook.”

--John Haydon, author and publisher in The Chronicle of Philanthropy, November 2008

Recommendations:

- a. An overall plan based on marketing research should be developed for the Commission, the Bureau and individual sites.
- b. Consider adding regional marketing positions or allocating marketing budgets to individual sites.
- c. Marketing should be expanded to include communicating with younger audiences using current technologies, such as websites, podcasts on the web, and Facebook pages for sites. Using current electronic communication technology invites immediate input and makes feed back more accessible to museums.
- d. Identify and cultivate new audiences. Related to Relevance recommendation above, sites and museums need to be clear about who they are trying to reach and what needs they are meeting.
- e. Marketing should increase awareness of specific services and programs related to targeted audiences. Educate the public about who we are and what we do. Provide education to community stakeholders.
- f. Invite the Commissioners to take a more active role in visiting the sites, following BHSM and PHMC initiatives, etc. Send publications and media released to Commissioners—everything with their name on it should go to them.
- g. Provide a template of design for brochures to maintain a standard appearance, but allow sites to purchase or produce them in appropriate quantities.

Recruiting and Succession Planning

BHSM must be prepared for the retirement of a number of upper level managers.

Recommendations:

- a. BHSM should develop contacts with museum studies and related graduate programs and their associated alumni associations. Use their electronic newsletters and other methods of communication to recruit candidates for all PHMC Civil Service lists. Advertisements of PHMC Civil Services lists should be placed regularly in major museum (and other appropriate) publications—electronic and paper versions.
- b. Institute a program of succession planning for higher level management positions.
- c. As BHSM looks at any restructuring of the Bureau, consideration should be given to growth potential so that qualified professionals can move up through the ranks, retaining their experience, skill and talent for the agency.

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- d. Investigate other organizational structures for BHSM and sites. Examples include managing a number of sites as large clusters and having the cluster managers report directly to the Bureau Director (eliminating Division Chiefs), or organizing more sites as smaller clusters in order to promote sharing resources among sites.

Building Associate Group Capacity

Associate/Friends groups are an important BHSM asset. As BHSM looks to them for more support in the future, Associate group development becomes a critical issue.

Recommendations:

- a. Re-form the Council of Associates Presidents and encourage regular meetings. The Council could be used for advocacy purposes.
- b. Develop standards and best practices for Associate groups. For example, examine the new 990 requirements for 501(c)(3) groups and ensure that all Associates are meeting new regulations. Develop standards and evaluations for Associate groups. In conjunction with this project, check to see if there are any organizational standards that might apply to Associate groups.
- c. Develop a list of training topics and provide training to Associate boards to build capacity and make them stronger partners in support of the BHSM program. Local Non-Profit Centers are a potential source of this training.
- d. Name an “Associate Liaison” within the Bureau office.
- e. Increase communications with Associates. Treat the Associates like partners in the management of sites and museums.
- f. Review connections between the Heritage Society and Associate groups. If a closer tie is to be developed, have an Associate president be a member of the Heritage Society board. Have regular communication between the Heritage Society board and the Council of Associates Presidents.
- g. Consider an application to the Institute of Museum and Library Services’ Building Institutional Capacity/Museums for America grant program to provide training to improve operation of Associate groups.

BHSM Planning Recommendations

As BHSM moves forward with implementing the recommendations of the Sustainability Study, both in general and for individual sites, the following need to be kept in mind.

- a. When the Commission approves final recommendations for the BHSM program, implementation plans must be developed for each site. These plans should document why decisions were made in ways that can be provided to the public, to legislators, to Associate groups, and to other audiences.

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- b. Site strategic plans must be updated to reflect Commission recommendations.
- c. The Bureau should do overall interpretive planning for the BHSM program. Who are our audiences? Are we meeting their needs? What/whose stories are we telling/not telling? Examine the scope of our story and how it is represented and presented.
- d. Identify and cultivate new audiences.
- e. Consider inviting other museums to be ancillary members of Trails of History to flesh out the Pennsylvania story.
- f. In an era of shrinking resources for contract work, in-house resources should be used to do strategic, master and interpretive planning. Using both site staff and staff from outside the site will provide broader perspectives.
- g. Following an overall review of interpretive planning for the BHSM program, an overall agency collections review (including the State Museum) should be done. Site collecting areas should be review and revised as needed and a collecting plan developed for each site based on these revisions.

Improving General Operations

The Committee recommends the following ways to improve general operations and develop staff.

Training

Training was a need mentioned in nearly every site assessment. BHSM should provide more training in operational policies and procedures for new staff when they join the Bureau, plus more job training for “old” staff when new programs are instituted or upgraded to keep them up to date and working efficiently.

Recommendations:

- a. Work with IT (in whatever form it takes through either PHMC or the Office of Administration) and HR sections to review options available for training. Take advantage of OA training classes and PHMC training classes (such as those being developed by Alan Byler). Options for delivery of training materials can include e-lms, regional training sessions in the field, and distance learning. Consider developing a regular distance learning-based “chat with HR” or other sections on needed topics.
- b. Develop a manual of procedures for the Bureau that encompasses everything from memos issued by the Bureau Director to most-often-referenced Management Directives. A copy of this manual should be at all sites and updated as needed.

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- c. Add as many annual tasks as possible to the BHSM Management Cycle Calendar—including requests from HR and other parts of the agency. Tasks should be spread throughout the year. Reasonable deadlines must be provided during seasons of high visitation at sites.
- d. Although new administrators have a list of required formal classes to take when they join PHMC, BHSM should further develop a mentoring/partnering program for new hires. This will become even more critical in the next few years considering the upcoming retirement of a number of senior administrators.
- e. Create a BHSM intern program.
- f. Provide training for front-line staff, who have the most contact with and impact on our visitors.
- g. Educate Harrisburg-based staff about what happens at a site. Institute a “Trading Places” program between Harrisburg and site staffs. PHMC exists to serve the public; PHMC should foster a customer-friendly/customer service attitude throughout the agency.
- h. Have Harrisburg-based departments coordinate requests for information from field sites through the Bureau Director and/or Division Chiefs. If possible, provide administrative assistance to complete requested surveys, or have surveys completed by a regional person or a contracted consultant, depending on the survey.

Staff Development

The Committee asserts that the most important asset of BHSM is its multi-talented staff.

Recommendations:

- a. Staff should be provided with training to do their work (see below)
- b. Staff should have realistic expectations of their job duties. For example, as site administrators are expected to become more entrepreneurial and raise more money in their community, another person on site may need to take over more day-to-day site management. However, this could lead to employees working outside of their classifications. The PHMC should review and resolve this problem.
- c. Staff should have access to appropriate tools to perform their jobs—everything from computers and software to large-size mowing equipment.
- d. Staff should be recognized for work that is done well. Awards beyond longevity, such as the “Extra Mile” and the “Electric Hammer” build morale and should be instituted. Re-examine the research done by Michael Bertheaud and consider implementing some award options—even if they are done on a site level rather than across the Bureau.

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- e. Sites should be provided with timely support in dealing with underperforming staff. Support the direct supervisor by providing administrative, bureaucratic, and emotional support to get a difficult job completed quickly.
- f. Institution of regular communication from the top down as well as the bottom up and inside the Bureau as well as with Associates is important.
- g. There should be a program in place for employees to provide feedback to their supervisors, even if informally.
- h. Develop methods of fostering a sense of camaraderie among Bureau staff. As one example, encourage “younger” folks to be more involved in BHSM by creating a BHSM “Young Professionals” group.
- i. Continue Bureau team support for major initiatives such as MAP surveys, accreditation, and exhibit development.
- j. Form Committees with various areas of expertise to discuss and review major Bureau-wide problems as needed.
- k. Consider adding duties to Division Chief responsibilities (for example, liaison to Associate groups, facilitator of master or strategic planning)
- l. Increase support for the development of volunteer programs.

Flexibility in Site Operations and Programs

BSM must be flexible in meeting the needs of the public with reduced resources.

Recommendations:

- a. Hours of operation should be made on a site-by-site basis in regards to local conditions and visitor needs. In some cases, it may serve more visitors for the site to open later in the morning and remain open later into the evening. Limited evening hours may be appropriate at some sites if site staff can be staggered. Based on visitation, some sites might be closed during winter months. Attendance records should determine if all sites should be open on summer holidays (Memorial Day, July 4, Labor Day).
- b. Review the directive that a PHMC staff person must be on site at all times when programs are licensed to Associates.
- c. Consider broadening the types of programs/activities offered at sites and museums, particularly following surveys of community and audience needs.
- d. BHSM should examine the viability of lease/sale of site rental properties, including revenue generating adaptive re-use of currently rented structures at some sites—Can rental properties be turned into better assets for sites? PHMC administrators and maintenance staff should not be the business of being landlords.
- e. Review cost-effectiveness vs. mission of having animals at individual sites; make determination on a site-by-site basis.

Sharing Resources

Many of the site assessments suggested sharing more resources among sites and museums as a method of dealing with the financial challenges now faced by the Bureau.

Recommendations:

- a. Regional staff people should be identified and trained in more detailed contracting and purchasing procedures. Then, when a site has to purchase items that are not day-to-day needs (such as truck tires), there is a regional purchasing agent to turn to.
- b. Bureau staff might become supply “gurus” to increase efficiency by becoming adept at using the system and could process orders efficiently. Other functions, such as supply-ordering, could be centralized and other “gurus” in the field, such as an exhibit guru, video guru, website guru, etc. could be identified.
- c. Determine whether cooperative purchasing of some items may be practical and cost effective, especially for sites that are close geographically.
- d. Overall clustering of other site functions and services may also result in a more efficient Bureau. Sites located near one another could share curatorial, educator, and maintenance expertise, lend equipment, trade fund-raising and grant-writing expertise, administrative expertise, facility and meeting-spaces, and professional and operating functions. For some sites, sharing with other nearby state agencies could be an option.
- e. Use in-house talent to improve operations—Use a Museum Shop group to review one store operation per year; use the Education Committee or Curators group to review one exhibit and/or program per year. A small site could have access to a larger site’s educator to help plan a proposed program.
- f. Museum store and other site representatives should discuss e-commerce possibilities with Ted Walke.

Planning Our Future Conclusion— Looking Forward

Implementation of Planning Our Future’s scenarios and general recommendations will put the BHSM and its sites and museums in a position to better preserve “the Commonwealth’s memory as a teacher and champion of its heritage,” enriching “people’s lives by helping them to understand Pennsylvania’s past, to appreciate the present and to embrace the future.”

Just as revisions to strategic plans based on implementation strategies will lead to stronger organizational focus at sites, changes to Bureau operations will lead to long-term financial stability for a successful and sustainable future.

Concentrating on more clearly defined goals will help both Bureau and site achieve their missions more efficiently. Developing staff, eliminating ineffective programs, and increasing revenue generation will allow PHMC to become an even better steward of Commonwealth resources as allocated to the Bureau. Because staff expertise is PHMC’s most valuable resource, sharing and developing skills with additional training, planning for succession, and creating paths for moving up within the organization will increase morale.

Above all, implementation of Planning Our Future will allow BHSM to become even more responsive to our constituents as a public servant to the citizens of and visitors to the Commonwealth. An overall review of audiences and interpretive planning will increase the relevance of BHSM sites and museums to the public and increase support from local communities. Collections planning will strengthen connections to our stories for visitors. Designing and implementing adequately funded marketing plans will improve site visibility, grow visitation, and increase revenue.

“Extreme makeover? Or just a correction in vision? Whichever path is followed, thoughtful, honest consideration about what constitutes appropriate stewardship of our historic legacy in the 21st century will be the key to successful preservation efforts. The result will be the creation of productive facilities that once again work as vibrant components of their communities, and are places that people want to see and be.” - Marian Godfrey

***“Extreme makeover?
Or just a correction in
vision?”***

--Marian Godfrey, Managing Director, Culture and Civic Initiatives, Pew Charitable Trusts as quoted in the National Trust for Historic Preservation’s Forum Journal Spring 2008, Kykuit conference—From the article “Historic House Museums: An Embarrassment of Riches?”