DEVELOPMENT STRATEGIES OF HISTORIC HOUSE MUSEUMS

A Thesis
Presented in Partial Fulfillment of the Requirements for
the Degree of Masters of Arts in the
Graduate School of The Ohio State University

By
Emily Danielle Wise, B.A.

The Ohio State University
2008

Masters Examination Committee:

Dr. James H. Sanders, III, Adviser
Dr. Barbara Zollinger Sweney
Dr. Christine Ballengee-Morris

Approved by:

______________________________________________________________________

Adviser
Graduate Program in Arts Policy & Administration
ABSTRACT

What makes a house museum successful? Historic house museums are a vital integration of basic education for students throughout the country. These museums’ fiscal well being must be sustained if they are to educate children and adults alike. By conducting case studies of two historic house museums’ operational and development strategies, their successes and challenges are explored.

This research considers the testimonies of key house museum constituents including staff, current and former board members, and volunteers of a house museum located in a large Midwestern city, and one in a small rural Mid-Atlantic Southern city. Primary document sources and published accounts were also analyzed as data. Through these interviews, patterns of performance are identified and each institution’s histories are told. By discussing each museum’s relationship to supporting organization and operational context areas of success and challenge are explored. By ensuring participant testimonies and institutional identities would remain anonymous, they were offered opportunities to candidly recount their stories and consider why their museums were successful and in what areas they might need improvement.

Research data findings revealed current and past strategies for corporate sponsorship, foundation support, grants, individual donations, memberships, rental fees, government support, and public recognition.
After analysis of findings, they were contextually interwoven to construct an overall picture of what a historical house museum is and might be in the United States. This research demonstrates how two house museums were successful in sustaining their educational and cultural missions, and explored their importance, successes and potential vitality for sustaining institutions with value to future generations.
ACKNOWLEDGMENTS

I would first like to acknowledge the support of my professor and advisor, Dr. James H. Sanders, III. With his careful and deep-founded knowledge of research in general, and of museum education, I have been able to better understand the importance of my research and the impact house museums have on their surrounding communities, and the museum field as a whole.

I would also like to thank the two institutions that allowed me to conduct research with their key constituents. Although, they will remain nameless, the many individuals who devoted hours ensuring I got the whole story are undoubtedly my greatest resource for this thesis.

Another huge helping of gratitude goes towards the Art Education department of The Ohio State University, including Dr. Barbara Zollinger Sweney and Dr. Christine Ballengee-Morris for participating on my committee as readers. The Cultural Policy and Arts Administration program within the Art Education department is a vital component to educating and training future leaders in the business of non-profit arts.

Finally, my ever-enduring love and thanks goes towards my family, my father David, my mother, Marsha and my sister, Lara. Without them, I wouldn’t have been encouraged to do “whatever I put my mind to” from the time I was a little girl until the completion of my masters’ degree. They are, above all, my greatest inspiration.
VITA

2008 ....................................MA, Arts Policy and Administration Program,
Department of Art Education
The Ohio State University, Columbus, OH

2006 ....................................BA, Art (Art History & Museum Studies)
Radford University, Radford, VA

2005, Summer ..........................Intern in Registrar’s Office,
Smithsonian American Art Museum,
Washington, DC

2006 – 2008 ............................Graduate Administrative Associate,
Development Department
Wexner Center for the Arts, Columbus, OH

2007, Summer ............................Advancement Intern,
Columbus Association for the Performing Arts,
Columbus, OH

July 2008 .................................Annual Fund Coordinator,
Baltimore Symphony Orchestra,
Baltimore, MD

FIELD OF STUDY

Major Field: Arts Policy & Administration
# TABLE OF CONTENTS

Abstract........................................................................................................... ii

Acknowledgments.......................................................................................... iv

Vita..................................................................................................................... v

List of Figures.................................................................................................... ix

Foreword: Key Concepts................................................................................... x

Chapters:

1. **INTRODUCTION**...................................................................................... 1
   - Issues......................................................................................................... 2
   - Overview of the Chapters......................................................................... 2
   - Importance & Inspiration......................................................................... 3

2. **LITERATURE REVIEW**............................................................................ 6
   - What is a Museum?.................................................................................. 6
   - Characteristics of Historic House Museums......................................... 7
     - Non-Profit Institutions........................................................................ 7
     - Historically Significant Structures..................................................... 7
     - Private Family....................................................................................... 8
     - Interpreting Local and National Heritage......................................... 8
   - A Brief History.......................................................................................... 9
   - Critical Issues Facing U.S. House Museums........................................ 12
     - Governance and Staffing.................................................................... 13
     - Preservation of Collection.................................................................. 15
   - Development Strategies.......................................................................... 19

3. **METHODOLOGY**..................................................................................... 22
Historical and Document Research ......................................................24
Qualitative and Narrative Research Methods ........................................25
Researcher Subjectivity ........................................................................26
Research Significance ..........................................................................27
Institutional Review Board Exemption ................................................27
Interview Coding, Strategies, and Analysis ..........................................28
Narrative Research ..............................................................................29

4. DATA FINDINGS ..............................................................................32

Board Dynamics ..................................................................................32
Copperfield House and Gardens .........................................................35
   A Brief History of the House, Family & Museum ...............................36
   Copperfield House and Key Auxiliary Mission and Purpose ..........39
   Fundraising and Development Practices .........................................40
   Programming and Community Impact ............................................42
   Current Strategic Planning ..............................................................45
   Primary Struggles and Issues .........................................................45
The Perry Museum ................................................................................46
   A Brief History of the House, Family & Museum ...............................48
   Perry Museum Mission and Purpose ..............................................50
   Fundraising and Development Practices .......................................50
   Programming and Community Impact ............................................51
   Current Strategic Planning ..............................................................52
   Primary Struggles and Issues .........................................................53
Closing Comments ..............................................................................53

5. DATA ANALYSIS ...........................................................................54

Copperfield House and Gardens Issues ..............................................54
   Key Auxiliary Governance ..............................................................54
   Generating Community Interest ....................................................58
   Community Limitations ....................................................................60
   Carving out a Niche .........................................................................62
   Marketing Focus ..............................................................................63
Perry Museum Issues ...........................................................................65
   Board Governance ..........................................................................65
   Community Limitations ....................................................................67
   Generating Community Interest ....................................................70
   Narrowing the Focus .......................................................................72
   Carving Out a Niche ........................................................................73
Public Recognition ................................................................................75
   Copperfield House and Gardens ....................................................75
Perry Museum.......................................................................................77
Founding Documents.............................................................................79
Copperfield House and Gardens...............................................................79
Perry Museum.......................................................................................80
Development Strategies...........................................................................82
Collaboration..........................................................................................82
Marketing Techniques..............................................................................85
New Programs........................................................................................87
Strategic Governance..............................................................................89
Summary...............................................................................................91

6. CONCLUSION....................................................................................92

Implications for the Field.........................................................................95
Additional Research................................................................................97

Appendices..............................................................................................99

Appendix A: Questions for Data Collection.............................................99
Appendix B: Completion of CITI Training..............................................102
Appendix C: Institutional Review Board Exemption...............................104
Appendix D: Budget of Copperfield House and Gardens, 2008-2009........106
Appendix E: Full Budget of Key Auxiliary, 2008-2009.............................109
Appendix F: Budget of the Perry Museum, 2008-2009.............................112

List of References....................................................................................114
LIST OF FIGURES

Figure

2.1 Typical organizational structure of Governance in Historic House Museums….14
4.1 Holistic View of Governance……………………………………………………34
4.2 Five Main Streams of Revenue for the Copperfield House and Gardens………41
4.3 Map of Grand River Region, showing “independent city” of Huntington……..47
4.4 Percentage of Revenue for Perry Museum……………………………………..49
FOREWORD: KEY CONCEPTS

The following terms, as defined by the researcher or other legitimate sources (unless otherwise indicated), will be used throughout this document:

‗Development‘ will be the most used term throughout this document, referring to the practice of fundraising. It is defined by the Association of Fundraising Professionals as, “the total process by which an organization increases public understanding of its mission and acquires financial support for its program” (AFP Dictionary, 2008). This is the primary use for this word throughout this research.

A ‘Historic House Museum’ is defined more in depth in my review of the literature, but it has been constituted as a non-profit institution housed in a historically significant structure, typically a home built, owned, or inhabited at some point in time, by a private family that contributes to the surrounding community, through collecting and preserving objects, and through exhibits and educational programs that interpret local and national heritage in its day-to-day operations.

Another important term that is important to the research presented is ‘Governing Institution/Body’ or ‘Parent Organization’ (referred to as both throughout). These are larger entities, such as a municipality, or another non-profit organization entirely, that oversees the financial, organizational, and operational activities of the historic house museum. Usually, the board or staff of the museum is made up of individuals from the governing institution. These are also the organizations that have historically helped the
museum form their articles of incorporation, create their mission and continue their programmatic efforts. This is versus a stand-alone historic house museum, or ‘independent house museum’ that has no outside funding source and governance, other than what they are able to obtain on their own as a staff and Board.

‘Non-profit arts or cultural organization’ is used numerous times in this research to refer to traditional non-profits organizations, like art museums, symphonies, theater groups, zoos, botanical gardens, and science museums. This term is important because it was a way for the subjects to compare their organization to these other ones, to see how their development practices were similar or different.

‘Preservation’ or ‘Conservation’ are used interchangeably as terms to describe part of the mission of a majority of historic house museums, which is to preserve local history or conserve the remnants of historic structures within their community. This term can also be applied to their collections, in terms of their care and maintenance.
CHAPTER 1

INTRODUCTION

Within historic house museum walls, objects, artifacts, and their stories help audiences of all ages understand their local community and its place in American history. But how are these comparably tiny organizations to stay afloat in an era when technology rules and blockbuster exhibits promoted by powerhouses like the Metropolitan Museum of Art, the Art Institute of Chicago, or the Getty Museum pack their halls, reassert their cultural authority, and fashion globally recognized brand identities? How is the small local museum to secure its fair share of funding or appeal to donors who can help sustain its mission? How does the governing structure of a house museum support the organization? How has leadership shaped its financial history, and how have they refined the institution’s fundraising and audience building practices? These questions are relevant when examining how American house museums have not only survived as cultural entities but have affirmed their importance to those communities they serve. This thesis seeks to explore possible answers to the preceding questions through a review of the literature on historic house museums and their governance and development practices, and through case study research in two historic house museums. Recounting and analyzing the governance and development strategies employed by each institution in
light of the literature, this study teases out how the house museum can survive and might thrive.

Issues

There are many issues facing American historic house museums today. With so many of these institutions in the country, there are many elements affecting them. They face many challenges, allowing them to fail financially. Some of these issues include the expense of restoration, preservation and daily maintenance; general absence of staff and/or volunteers; the demographics of constituents – this includes the staff, the board, the visitors, and volunteers; lack of professional expertise within the staff; natural disasters destroying objects and collections; lack of exhibition and programmatic focus; gaining community intrigue and finding the purpose of the institution within the community where it is situated; and most importantly, lack of financial resources for the numerous amounts of house museums within the United States.

Overview of the Chapters

In the review of the literature, background information about historic house museums will be presented. I will give a history of how house museums came to be and when they began to struggle. Issues and challenges of their journey will be explored and various explanations will be made as to how they are typically governed and structured.

Within my methodology chapter, I discuss how I conducted my research, describe how I collected my data, what interview methods I utilized, and what previous qualitative researchers impacted my current research. I will also elaborate on why I use qualitative research, case study methodology, and narrative/historical research methods. Finally, I will identify my subjectivity and describe why this research is important to me.
In the data findings chapter, I establish the range of responses and patterns of the subjects’ interview testimonies. I will describe my participants’ demographics, including gender, age ranges, average annual salary, race, and nationality. Background information will also be given on both museums studied, including, (but not limited to) their geographic location, size of community, history of that historic house, the governing structure of the museum, and current fundraising practices. The questions asked of the subjects summarizing informants’ responses will be the bulk of this chapter. Overall themes will be presented and discussed in more depth within the Chapter 4 Analysis.

My data analysis chapter teases out those meanings and patterns have uncovered in my data findings. Various analytical methods will be explained and findings explored throughout this chapter. My analysis of research participants’ testimonies will be examined in light of public recognition that each museum has earned, and the founding documents of both institutions in the case study.

Importance and Inspiration

There are many reasons why the survival of historic house museums is important. First, they are crucial resources to preserving much of the local history that goes under the radar of textbooks, and are just as crucial to the community that surrounds the museum. They also help preserve items and objects that might have gotten tossed in the trash, and again, are important to the community as they help to complete the missing links in the local history. They might be the only resource available to the townspeople to explain why traditions carry on with the city limits. The knowledge contained within the historic house museums is essential to the society in which it resides. One cannot underestimate by the value of small nuanced histories contained in these houses.
One of the most important functions that house museums serve is to educate the surrounding community about local history. These institutions may be only museum or library for hundreds of miles for that serve a specific community. It may be a community’s only access point to a collection, and it might actually be the only museum experience for many people who live in that area. Historic house museums are the first museum experience for many. Young students may travel in school groups to these house museums, and learn about their town’s history. It could be a turning point for some and become an inspiring experience for those who may someday contribute to the museum community.

The options are promising for historic house museums. They have to remain optimistic if they are to meet their goals and create a future not only for themselves, but the community enveloping them. If they wish to keep their doors open, their priceless collections, and vital mission, they have to perform the very foundations on which they were organized; preservation, exhibition, and education. Hopefully, they will find new ways to persevere and as they do, they will continue to educate those who cross the threshold of the present and go back in time to discover local history and learn more about their heritage.

This research is important to house museums as it shares sustaining strategies of these valuable institutions, identifies new and current development strategies and suggests ways these powerful tools can be used to ensure their advancement. How can a historic house museum be successful in its financial strategies and enhancement of its programs and mission? The subsequent chapters offer the answers I have found.
CHAPTER 2

REVIEW OF THE LITERATURE

What is a Museum?

Within a community, historic house museums define their purpose as generally committed to sharing and showcasing local history (Wise, Interview, 2007). Before specifying exactly what historic house museums are and how they contribute to society, it is important to look at institutional definitions of the museum. According to the American Association of Museums’ publication, *What is a Museum?* (2007), the following are the museum qualifying accreditation criteria.

- Be a legally organized nonprofit institution or part of a nonprofit organization or government entity
- Be essentially educational in nature
- Have a formally stated and approved mission
- Use and interpret objects and/or a site for the public presentation of regularly scheduled programs and exhibits
- Have a formal and appropriate program of documentation, care, and use of collections and/or objects
- Carry out the above functions primarily at a physical facility/site
- Have been open to the public for at least two years
- Be open to the public at least 1,000 hours a year
- Have accessioned 80 percent of its permanent collection
- Have at least one paid professional staff with museum knowledge and experience
- Have a full-time director to whom authority is delegated for day-to-day operations
- Have the financial resources sufficient to operate effectively
- Demonstrate it meets the Characteristics of an Accreditable Museum

*(What is a Museum?, 2007)*
The International Council of Museums (ICOM) defines museums as “non-profitmaking, permanent institution in the service of society and of its development, and open to the public, which acquires, conserves, researches, communicates and exhibits, for purposes of study, education and enjoyment, material evidence of people and their environment” (What is a Museum?, 2007). The Institute of Museum and Library Services (IMLS) has reproduced this definition in their founding legislative document; the Museum and Library Services Act of 1996 and its Reauthorization in 2003.

A public or private nonprofit agency or institution organized on a permanent basis for essentially educational or aesthetic purposes, which, utilizing a professional staff, owns or utilizes tangible objects, cares for them, and exhibits them to the public on a regular basis. (AAM, What is a Museum?, 2007)

In general, a museum is an institution that contributes to society through caring for and educating through objects and collections. Not all historic house museums are accredited. Some are narrowly defined. Historic houses serve as home bases for historical societies, service organizations within a community, or as the town’s visitor’s center. But because of their historical importance to the community, many are dubbed as museums.

The American Association of State and Local History (AASLH) is a National organization supporting the programs and missions of house museums throughout the country. It is the only organization to concentrate solely on state and local history (AASLH About Us, 2007). AASLH is a support structure for the leadership within organizations that preserve and interpret local history. These are historical societies, larger research institutions, such as universities and major museums, and the thousands of smaller, yet equally important historical house museums (AALSH About Us, 2007).
In this thesis, I am defining the historic house museum as:

1.) A **non-profit institution** 2.) housed in a **historically significant structure**, typically a home built, owned, or inhabited at some point in time, 3.) by a **private family** that contributes to the surrounding community, 4.) through **collecting and preserving** objects, and 5.) through **exhibits** and **educational programs** that 7.) **interpret local and national heritage** in its day-to-day operations.

**Characteristics of Historic House Museums**

1.) A Non-Profit Institution

For the purpose of trying to define development strategies of house museums, it is essential that I qualify their legal structure. Non-profit institutions are organizations designated by the Internal Revenue Service (IRS) as charitable, cultural, and/or educational under subsection 501(c)(3) of the IRS code. House museums do not distribute earnings to shareholders, as would a for-profit corporation, but reinvest funds into the programming and maintenance of their institution (IRS *Charities and Non-Profits*, 2008).

2.) Historically Significant Structure

What sets a historic house museum apart from other museums is the historic structure in which the museum resides. Historic house museums are typically founded given the historic significance of those residents who once resided within them. The home itself is often the center of the institutions’ programming, both as a physical site, and as an object of study. In essence, the house is part of the collection comparable to major institutions’ paintings, fossils, and artifacts. As will be discussed later, many
historically significant homes may be a part of a larger museum or cultural institution’s collection.

3.) Private Family

Historic homes are just that – homes. The most famous house museums in the United States were founded because of who lived in them. For example, George Washington’s Mount Vernon estate was one of the first with national significance. The stories that the structures tell are typically that of the people who resided within their walls. These stories speak to our National identity. The mission of the non-profit is to interpret those lives and their role within the communities and to assist visitors who come through their doors today in understanding their significance. I will discuss the important aspect of historic homes in the history of American house museums in Chapter 4.

4-7.) Interpreting Local and National Heritage

The main purpose of many historic house museums is to preserve area history through collections of antiques, artifacts, and educational programs that interpret the collection which contributes to the community in which they are situated. These may be the only museum for miles in many U.S. communities, or the only institution to house the particular collection of important objects, on a regional level. Tours for school field trips, community day open houses, preservation and storage of significant artifacts, and displaying them are just some of the ways historic house museums serve those who visit them. These objects in the house museum collection usually reflect the history of the surrounding area and town. These collections help define a community and call attention to its histories, therefore it is important for each to take great care in preserving the institution’s cultural objects.
A Brief History

Although there are hundreds of thousands of historic homes in the U.S., there was a time when many of these structures were close to their end and falling into ruins as early as eighty years after the U.S. Constitution was written and signed. As Revolutionary War heroes began to die, Americans saw the importance of preserving their memory through erecting monuments and preserving historical sites. According to Fiske Kimball (1941), this was the beginning of the Preservation Movement in America (Kimball, 1941). Shortly after, in the 1850’s, a private citizen named Ann Pamela Cunningham purchased Mount Vernon, the home of George Washington, after the both the Federal government and the state of Virginia declined to purchase it (Kimball, 1941). This was another big step in the preservation and purpose of historic homes in the U.S. It is still operated privately by the Mount Vernon’s Ladies Association.

Many historic homes, including Mount Vernon, were being purchased for preservation because of the significant historical figures that once lived in them. Presidents, military heroes, and artists are just some of the types of people that Americans felt the need to honor through the preservation of their historic homes. Nathaniel Hawthorne was another figure whose life was seen as historically significant and his accomplishments were preserved by an architectural conservator, Abbott Lowell Cummings, through the development of the museum at the House of the Seven Gables (Seven Gables Tour of the Property, 2007). Countless other house museums were developed for this very reason and still survive to this day.

Personal names cannot always be attached to house museums. Larger museums and institutions have purchased many historic structures as additions to their own
collections. In 1933, museums in the U.S. owned about forty homes, including those in the Philadelphia Museum of Art, who owned a significant percentage of that total number (Kimball, 1941). Museums throughout the U.S. still own private historical homes as part of their institutional advancement efforts.

Around this same time, John D. Rockefeller began the preservation of the city of Williamsburg, Virginia (Kimball, 1941). This was seen as a great advancement in the movement to preserve both homes throughout America, and National history. Citizens of the United States learned a great deal about the significance of historic sites while in Europe during the First World War. They realized it was important to preserve buildings and structures as part of preserving personal and social history. While in Europe, Americans learned the importance of keeping original structures intact as a source of historic knowledge, and through them came a better understanding about learning from these homes (Kimball, 1941).

Up until efforts to reconstruct Williamsburg as a historical “living” museum were underway, the preservation movement had been mainly a federal endeavor. States and local municipalities thereafter started getting involved in collecting their own historic properties and preserving that heritage during the 1940’s. In 1941, Fiske Kimball concluded his article on the Preservation Movement by stating, “State governments, through their historical and conservation commissions, are beginning to follow Federal leadership in study and care of works of local significance” (Kimball, 1941, p.34). After that, the movement to preserve or search for these historic homes started booming.

During the 1960’s and 1970’s, it seemed everyone who lived in a historic home wanted to create a museum or designate their building as a venue by opening their doors
to the surrounding community (Wise, Interview with Staff, 2007). After great increases in the number of house museums forty years ago, there came a sharp decline, with many failing shortly after. These various historical homes as “organizations,” could not compete with one another and in effect, the collections they housed started to suffer. Currently, there are 612 million objects at risk of damage and time is not on the side of these valuable institutions or their deteriorating artifacts (Dotinga, 2006).

So, where do historic house museums currently stand in the 21st century? They are dispersed throughout the country, concentrated in areas like New England, the South, and Midwest, and are somewhat popular. Over 16,000 people surveyed said they visited historic sites or house museums in 2006 (About Museums, 2007). Throughout the year, up to a million people might visit the larger historical sites like Mount Vernon or historic locations in Philadelphia or Boston (Butcher-Younghans, 1993).

There are many house museums within the United States. The American Association for State and Local History (AASLH), a professional association for house museums has attempted to inventory of all of them. They affirm the broad range of types and purposes, and at this point in time, acknowledge they cannot pinpoint an exact figure.

To begin with, it’s difficult to get a handle on exactly how many house museums there are. Since they range from large, well-known cultural icons that welcome hordes of visitors annually to small, mom-and-pop operations that are open only sporadically and are not affiliated with any professional organization, merely enumerating them is a challenge. A 1988 state-by-state survey conducted by the National Trust estimated the number at close to 6,000 — but of course that figure, even if it was reasonably accurate at the time, is now outdated (Moe, 2002).

Among the range of historic house museums are open-air museums (like Williamsburg), living history house museums, buildings serving as rental facilities for events, town halls, community meeting places, residents of historical societies, local and
regional arts schools, or full-service museums. Some historic house museums involve a combination of all the above.

Across all their purposes, a common factor among house museums is interpretation of a core mission that is communicated to the community. These missions may be communicated through brochures, guided or self-guided tours, stationed interpreters, reenactments, demonstrations, community days, lectures, workshops, and the gift shop. Historic house museums are better able to serve their community and maintain their purpose through educational programs that emerge from their collection. With all these positive attributes of historic house museums it might be hard to see why many are not adequately funded or sustained. Many factors contribute to the Historic House Museum’s decline, and if Americans are not careful, this could present a collective challenge.

Critical Issues Facing U.S. House Museums

There are many issues facing historic house museums today. Given the proliferation of these institutions in the United States, there is an ever increasing likelihood that pressing physical and fiscal challenges may lead to more and more house museums to fail. Relative to older nations around the world, the United States is still a young country and it has not reached the point where we are able to learn from our mistakes in preservation and collection of history. Given the scarcity of house museum consultants, it is hard for historic house museums to find guidance that is readily and locally available. It is not accessible or is not affordable for these institutions. Conversations about this problem, and how museums should be preserving collections started only in the early 1990’s since that’s when the majority of research started to become prevalent. The
dialogues now underway are likely to continue for decades, or as more information becomes readily available. Whether or not this problem will ever be solved is another question.

**Governance and Staffing**

House museums generally have no more than a few staff members, or even one if they’re lucky. According to a study done in the early 1990’s, 65% of historic sites in the U.S. had no full-time paid staff and 19-27% had only one full-time staff (Butcher-Younghans, 1993). It would appear that without volunteers, nearly two-thirds of House museums could not open their doors. The Trustees and Boards of historic house museums often have their hands full with keeping their doors open and their organizations up and running. They are sometimes the only people willing to contribute and sustain their community’s historic legacy. The organizational structure of a house museum is important to examine, as it informs an agency’s strategies for developing requisite resources.
If the money is available, a house museum’s board members have to find the right person to be the institution’s director, especially if they are to be the only full or part-time staff hired, and must create inventive ways to recruit and retain those volunteers who are so crucial to the museum’s success. Careful leadership and hiring decisions might be the best way a governing board can ensure their organization survives. Having a strong volunteer or docent program, dedicated streams of income, and structural partnerships with larger, stronger agencies can also help reduce the risk of their demise.

A significant problem often structured within the organizational design of historic house museums is its diversity of the volunteer demographics. Museum volunteers currently appear to be an increasingly “aged” or graying population (Salisbury, 2005). The stereotype of the typical house museum volunteer is a retired, blue-haired, matronly
tour-guide (Salisbury, 2005). But one might ask, What are these institutions going to do when this population starts to decline?

Recruiting volunteers has become harder and harder as years go on, and as more and more homes are in peril. Of the possible contributors to volunteer decline are an increased number of women in the workforce; workers remaining in the work force for longer durations; corporations increasing demands for worker efficiency and productivity; and a declining commitment to communities in which corporations are situated.

Given the limited number and frequent turnover of staff and volunteers within historic house museums, a serious challenge to their survival is a lack of professional experience in caring for and preserving the house museums’ objects (Wise, Interview with Staff, 2007). Given the mix of skills needed for staff hired to run a house museum, those with only history-oriented, or object-centered backgrounds may lack the non-profit skills or experience to actually manage an organization. Staff and volunteers may know the stories that the house contains, but only those with sufficient depth of knowledge about how to care for its artifacts, can ensure they do not deteriorate from improper care. Without expert conservators, adequate preservation accommodations, (often seen as “unsexy”), cannot be guaranteed. It may be hard to appeal to funders to give money for an HVAC system, or for archiving of materials, but these infrastructures are nonetheless crucial (Dotinga, 2006, p .14).

*Preservation of Collections*

Another issue plauging historic house museums’ preservation of objects is their frequently inadequate natural disaster plans. (Hurricane Katrina, in example, served as a
rude wake-up call for museums throughout the country.) Natural forces like U.V. deterioration and humidity also contribute to the slow deterioration of objects. What often appears even more of a challenge, is managing those catastrophic or slowly unfolding risks. According to Dotinga (2006) there is no emergency plan in effect for 80% of the country’s collecting institutions (Dotinga, 2006). With areas like the Midwest experiencing tornados on a regular basis, and west coast institutions at risk for earthquakes, it is vital for smaller institutions like historic house museums to be prepared to protect their assets. This preparedness is essential if a museum is to continue making contributions to its communities.

Some experts think that too many historic house museums rely solely on their objects, and not the stories that emerge from the homes themselves. The argument leveled is that there is a tendency to collect so many objects that they cannot all be displayed and are put away into closets or trunks that are inadequate by museological standards. Given inadequate funding, these institutions may not be able to take care of all the objects they have, or, for that matter, much more than keeping the lights and heat on. By not showcasing or interpreting what is in the collection, a community may become apathetic to the institution, and forget the house museum is even there. According to an article in the Christian Science Monitor, “‘If the collections are unused…there’s a lot of people who wonder why you have them in the first place.’ And apathy is the first step toward deterioration,” says an executive director of a natural history museum (Dotinga, 2006, p. 14). Historic house museums may just not be interesting to the general public, given its preoccupation with the astronomical price tags placed on objects within the museum.
Robert Moss, the director of the Athenaeum in Philadelphia, (which was originally created as a special collections library in 1814) (*About the Athenaeum*, 2008), warns, however, that the “tendency is to concentrate on [the objects]. The houses become object tours, but it is the stories of the people that make the houses come alive” (Caba, 1998, p. E01). It is the liveliness of such experience that may be lacking in many smaller house museums.

Eilean Hooper-Greenhill examines the changes within learning through objects and surveys their implications throughout various historic epochs in her book, *Museums and the Shaping of Knowledge*. Hooper-Greenhill’s focus on museums calls attention to subject positions, arrangements of power and shaping of ontological understandings that have shaped what we know today. The specific case studies she presents include those of the Medici family, as perhaps the earliest example of a house museum. The “irrational cabinet” of significant curiosities (significant to and organized by those who possessed them and to an elite population invited to view them) were likewise housed in famous and powerful households world-wide. Their attempt to catalog the world was also organized by heads of state who claimed their power through the establishment of the one ideal or powerful subject position. Even later encyclopedic displays reflected diplomatic interactions (and Nationalist aims of Napoleon). Whereby a Nation or individual who asserts power through cabinets of the world, or objects as commissioned by the Medicis, both geographic regions and historical juncture will define many of the professional museum roles, and ordering of encyclopedic collections. Three of the four cases Hooper-Greenhill explores can clearly be seen as precursors to today’s historic house museums.
In Hilde Hein’s book, *The Museum in Transition: A Philosophical Perspective*, she spends a chapter exploring museums’ need for “Transcending the Object”. Her main argument concerns how the meaning of an object changes with its context. A utilitarian object outside of the museum has a whole different function and meaning than that it contains once it is exhibited in the museum. Hein clearly defines this transition, remarking, “from object to museum object, things gain and lose dimensions of use and exchange value as well as other dimensions of meaning” (Hein, 2000, p. 51). This idea of meaning “transcending the object” remains an important concept for house museums, as the meaning placed on a house and its objects are transformed by both presentation and interpretation. What an object means depends on where it is, and house museums are continually struggling to learn about these factors, both educationally and organizationally. Historical house museums struggle with this in/exclusion daily, as they collect historical objects, and as people throughout the community bring in their unwanted antiques to donate to the museum. One must ask then, how house museums remain committed to their mission, given this hodge-podge of collections.

Historic house museums risk being forgotten within their community. Moe (2002) suggests that there are too many historic house museums in the United States. But, one might ask, could there be too much of a good thing? According to some, it is possible, so House Museums need to start developing more strategies to ensure their own fiscal stability, financial viability, and critical success in programming and depth of community involvement.
Development Strategies

Many non-profit organizations face a similar challenge; where to obtain funding.

The mix of non-profit funding traditionally come from the following: public or government sources (legislated expenditures from federal, state, or municipal government budgets and dedicated income streams), operating and special project grants (either public or private), private contributors (in the forms of advised gifts, restricted funds, or foundation grants), individual gifts (cash contributions made by private citizens), membership programs (often in classes of giving from $25-$1000/year), event income (galas, auctions, openings), rental income, (meetings, conferences, and weddings), and earned income (from sales in a museum shop, or admission fees). This mix of income sources is similar for historic house museums, many competing with each other in trying to secure funding to keep their doors open and their programs running. Given the scarcity of resources in many communities and lack of innovation in income generation, the budget growth seen in the last quarter of the Twentieth Century has ceased.

Organizational and skill development for museum professionals can be found that educates historic house museum professionals and boards about different strategies for keeping their doors open and (re)defining why they are important within their community (AASLH About Us, 2007). Among these is bringing donors behind the scenes and getting them involved in the care of the collection. Dotinga (2006) in the Christian Science Monitor, notes, “…patrons are fascinated by opportunities to poke around behind the scenes and learn about less-publicized efforts” (Dotinga, 2006, p.14). With many house museums having the problem of large collections hidden away, this could entice constituents to become more involved and learn about such hidden collection treasures.
Other suggestions Dotinga offers include behind-the-scenes tours, shadowing the staff for a day, and eliciting volunteers to help in the general maintenance of the museum (Dotinga, 2006). Larry Reger of the Heritage Preservation in Washington, D.C. affirms the importance of working with donors and engaging them in the institution in order to secure their fiscal investment in the institution. “If people know what’s behind the scenes, what museum or library has, they’ll be more appreciative of the need to take care of the cost of doing that” (Reger in Dotinga, 2006, p. 14).

Other ideas for appealing to funders involve more traditional methods of collaboration with surrounding communities. Even if already being practiced, today’s historic house museums must be more creative in how they collaborate. They can utilize the resources they already have in the community, such as having college students studying museum education, history, or preservation come in to volunteer or intern as part of their required coursework (Wise, Interview with Staff, 2007).

Among other ideas for the sustaining historic house museums is to find new stories to tell within the museum, or finding new uses for historic sites. The preference of some is to turn historic sites into venues for events, rather than create chaos among the collections of traditional homes, (where they are in danger of being damaged during events) (Caba, 1998). This still keeps the historic emphasis on the building prominent, but it doesn’t endanger the numerous antiques and artifacts that would normally be on the inside. This idea will be discussed in the Data analysis chapter, both as a way for historic house museums to bring in revenue, as well as increasing expenses. Finding new ways of telling the story of a family or people who lived in the home can involve dramatic reenactments such as, “using actors, using more storytelling, using more personal
experience, using food, [and] dining…” (Salisbury, 2005, p. B12). This approach has become the norm as house museums seek to reinvent their methods for realizing their educational mission and it history within the community. In *The Museum in Transition* Hilde Hein (2000) suggests that objects are the means to the end and the end is the experience. People will take away more thanks to the experience they have with the objects.

These are just a few of the published suggestions as to how historic house museums can better guarantee that their doors remain open, but they are only a few among all possibilities. Mine is just the beginning of an ongoing study of ways the museum can improve its practice of securing funding from various sources, relaying their mission, defining their purpose, and appealing to funders. Historic house museums are competing for the same grants on a state, regional and National level: a shrinking source of revenue, all agencies appear to be losing in the long-run (Salisbury, 2005). These agencies are losing their zest and appeal to private donors and corporations. If they have seen one house museum, they have seen them all, is the attitude, of many of funders (Wise, Interview with Staff, 2007). The question then is how historic house museums can set themselves apart from others in both mission, product, and purpose within communities?
CHAPTER 3

METHODOLOGY

This thesis examines developmental strategies of two historic house museums and employs a case study methodology. I draw on qualitative researcher, Robert Stake (2003) as a guide in my designing this case study research. I will use methods of narrative inquiry advanced by Kathleen Casey (1990, 1992, 1995), Margaret K. Nelson (1992), and Catherine Kohler Riessman (1993), ever aware of my own subjectivity (Peshkin, 1988) when interpreting these narratives. I will further draw on the work of Frances Thurber (2004) in *Handbook of Research and Policy in Art Education*, and the historical research methods described by Mary Ann Stankiewicz (1997). In this chapter I define each method I will use, and describe how they will work together to form a sound analytical framework. I will begin by introducing and briefly describing each of the sites in which this study is situated, and identify the coding system I will employ throughout the study.

Of the two historic house museums I study, one is a small historic house museum located in a mid-size city within the Midwest – an entity I will refer to as Museum A or the Copperfield House & Gardens, and the second is a small institution located in a modestly populated (approximately 16,000 people, with a mid-sized university making up a portion of that population), rural industrial town in the Southeastern, Mid-Atlantic region that I will refer to as Museum B or the Perry Museum. I will distinguish between these two museums, describing certain characteristic features, but not revealing either
institution’s actual identity. The names have been made up to conceal the real identity of each institution.

I will examine these museums from multiple perspectives in order, to help establish how subjects across each institution value its development efforts and fundraising strategies. I will examine historical documents that establish how each institution was founded and evolved over time. I will also conduct interviews with key constituents including staff, board members, and volunteers to establish how each perceives the museum’s mission and history. I will consider each subject’s perceptions of the institution, describing and analyzing their testimonies based on the role each plays in the museum. I will then piece findings of each methods together to identify each institution’s public value, cross examining those valuations within and against any recognition the museum has received and through an assessment of their programs as published within each museum’s documents and as those findings align with my interview data.

I had originally intended to conduct interviews with between fifty to one-hundred percent of each museum’s existing staff and board leadership, but not to exceed 120 interviews in total. I interviewed former board members and volunteers and others recommended by those in current positions – a method commonly known as snowball sampling. I asked each subject how they became involved in with the institution?, their perceptions of how the museum raises funds?, those struggles they see facing the museum?, how they position the museum to donors and funders? and documented any other information that subjects viewed as important – including how each has experienced the museum’s strengths and weaknesses. This combination of queries (see
Appendix A for open ended questions that were posed to subjects) helped me answer how historic house museums can successfully develop new and improve existing fundraising and development strategies.

**Historical and Document Research**

I have critically analyzed all existing historic documents for both house museums studied. I examined incorporation documents, institutional budgets, bylaws, and other sources of information (grant awards, project reports, etc.) that gave insight into why the museum was founded and how its operations serve its mission. In my interviews I sought to glean additional information about the museum’s governing structure and how it impacts the way the museum does business. I quite intentionally chose these institutions, knowing that Copperfield House and Gardens was structurally an interest of a service league, and the Perry Museum, while governed by its own board, and received a large amount of its funding through its city council.

Looking at the different histories of these museums, I employed the methods of an historian, “shaping the past for present use” (Stankiewicz, 1997, p. 58). My writing aimed to reflect the values of those being interviewed for this study. I sought to understand what might be going on in each subjects’ renderings of what has happened in the past. Since I was developing strategies for improving fundraising tactics, learning from subject’s interpretations of the past was expected to indicate what their institutions might need to do to improve its future fundraising practices. By encouraging subjects’ reinterpretation of historical facts I fully facilitated their answering questions with which they may have been struggling, but might see it in a different light as a result of the research. As the researcher, I sought to “provide background information while keeping the story moving
and maintain[ing] the reader’s interest in a plot where the outcome is usually known” (Stankiewicz, 1997, p.67).

Complementing my historic and narrative research data, I examined and analyzed supplemental documents, ranging from newspaper clippings about each museum, their educational handouts, and any public recognition that enhanced its purpose to the various appeals integral to each institution’s fundraising. Distilling these multiple forms of documentation and subject testimony, I aimed to richly describe and accurately construct an image of the museum’s programs, services and public value. These are critical features that must be defined by any institution developing strategies for fundraising and sustainment. Beyond simply reconstructing a picture of each entity, I aimed to analyze and discuss each museum’s internal cohesiveness (alignment of mission and service) and cross-analyzed and compared the two institution’s mix of programs, services and fundraising/development appeals.

Qualitative Research Methods

This study employs qualitative research as a method designed for gathering in-depth descriptive data about social institutions, interactions and products. By conducting case study, the narratives subjects construct were expected reveal more about participants’ perceptions of the problem at hand than would have been possible if quantitative research had been exclusively employed. This way of conducting research is expected to create “a deeper understanding of social phenomenon, providing thick descriptions of settings and participants in a specific context” (Thurber, 2004, p. 489). By conducting my research in sites regularly frequented by the subjects – both off-site and within the organization being observed – I aimed to make them at ease and willing to be
open and candid with their responses. I expect to find meaning through an analysis of every detail of the subject’s narrative and through my field notes on the surroundings in which our conversations unfold.

Researcher Subjectivity

I recognize that unavoidably my conduct of this qualitative research case study may potentially be considered subjective. In bringing part of myself into the research: and I know I run the risk of my findings being considered invalid in the eyes of academics and researchers. I acknowledge a passionate commitment to these institutions, a standpoint that maintains they are vital to their communities and need to be sustained for future generations. While this admittedly can be seen as a form of openly ideological research (Lather, 1986) I will nonetheless “systematically identify [my] subjectivity throughout the course of [my] research” (Peshkin, 1988, p. 17). Peshkin contends that when a researcher does this,

they learn about the particular subset of personal qualities that contact with their research phenomenon…These qualities have the capacity to filter, skew, shape, block, transform, construe, and misconstrue what transpires from the outset of a research project to its culmination in a written statement. (Peshkin, 1988, p. 17)

Further, since I have been personally invested in one of the museums and have come to know the community that surrounds the other, my familiarity with both will hopefully enable new strategies and informed interpretations to be forthcoming.

I believe that case study is the best method for my research because of the nature of the problem. I am hoping that by examining two similarly sized institutions and their practices, my research on historic house museums will offer some insights into better fundraising and development practices. In analyzing these particular institutions, I hope
to potentially assist them in improving not only their fundraising techniques, but also how they market and present themselves to the communities that surround them.

Research Significance

Often historic house museums are the only museums a child may visit or learn from throughout their twelve or thirteen years of public schooling. Other times, the historic house visit may be the first museum experience for local populations. This was the case when it came to my own museum experience – a formative event that has in-part inspired my research. My goal is to learn how these communities’ house museums operate and how they might develop new strategies for advancing the purpose of the museum, and their fiscal and programmatic health.

Institutional Review Board Exemption

This research complies with the Office of Responsible Research Practices at The Ohio State University. It is considered exempt by the Institutional Review Board (IRB) under Category 2, as it constitutes:

Research involving the use of ... survey procedures, interview procedures or observation of public behavior, unless:

a. information obtained is recorded in such a manner that human subjects can be identified, directly or through identifiers linked to the subjects; AND,

b. any disclosure of the human subjects' responses outside the research could reasonably place the subjects at risk of criminal or civil liability or be damaging to the subjects' financial standing, employability, or reputation

No persons under the age of eighteen was interviewed or observed during this research. Proof of exemption was made available to all recruited research subjects. Confirmation of my completion of the Certified Institutional Testing Initiative training may be found in Appendix B and the full IRB exemption in Appendix C.
Interview Coding, Strategies, and Analysis

Most all interviews were conducted in person and all conversations were audio tape recorded. In compliance with the IRB, I have attempted to make sure that all subject identifiers were removed. All individual subjects interviewed were assigned a code number for organizational purposes. All staff were coded by numeral, beginning with ‘1’ and continuing consecutively for every staff person at an institution with successive letters in the alphabet. So, for example, the second staff person interviewed at Copperfield House (Museum A) Gardens was A1b. The same was used for board members, with their corresponding number being ‘2’. So at the Perry Museum (Museum B), the 10th board member interviewed was B2j. Volunteers and former board members interviewed were assigned the number ‘3’ and the same coding was applied for them as well.

Each interview will be a conversation with a valuable stakeholder – those who could help develop new strategies for advancing the financial plans of their institution. According to Margaret K. Nelson, interviews should be open-ended, to allow the interviewees to tell their stories in their own words, with the interviewer directing questions only as necessary to make sure that specific areas were covered” (Nelson, 1992, p. 168). My open-ended questions focused on 1) gathering general historic knowledge about each institution, 2) uncovering current fundraising strategies employed, 3) identifying struggles that subjects have witnessed their museum enduring, and 4) other insights into the institution’s staff and board members’ lives – allowing them to tell their stories and define their position within the institution (see Appendix A for list of open-ended questions).
After interviews were recorded, I applied the coding system defined above to organize what interview goes with what person and then for reading purposes, I will create pseudonyms to use in my data findings and analysis chapters. When transcribing each and every interview, I did the same. In doing this, I hope to identify patterned perceptions of individuals working with/in each institution on the museum’s successes and opportunities. I anticipate finding verbal clues that may help me to understand the struggles each museum faces and the strategies that could be developed in each case.

Narrative Research

Kathleen Casey contends that the perspective of the subject is more important than the interviewer – subjects critical to my understanding of how these historic house museums have survived and prospered thus far. The subjects’ standpoints will likely disclose their social values and reveal their cultural understandings. Casey constructs her approach to narrative research from Michael Bakhtin, and asserts that “[t]he notion of ‘dialogue’ explains how significance is socially constructed out of lived experiences, while the idea of ‘discourse’ supposes that there are distinguishable patterns of understanding among members of a particular social group” (Casey, 1990, p. 189). She too asserts that, “the open-ended format…allows the interests of the narrator, rather than those of the interviewer, to dominate” (Casey, 1992, p. 189). In considering subject responses, I hope to uncover new and improved development strategies for historic house museums as defined by those within the institution – and not as an imposition of the researcher.

I followed this subject-centered standpoint when examining both founding documents and the supplemental materials. By looking at the organizational background
through the eyes and ears of those who initially made and recorded it, I hope to understand their way of reading the institution and its financial history. “The findings from oral history interviews challenge the impression gained from written documents alone” (Nelson, 1992, p. 167). Multiple data sources are used to triangulate testimonies obtained through interviews with board members, staff, volunteers and donors. Throughout the process of data collection, I am continually analyzing my findings – theorizing developmental actions and strategies that could positively impact the institutions fiscal health.

My analysis of narrative data has been concerned with listening to the stories of my subjects. By definition, narrative analysis “takes as its object of investigation the story itself” (Riessman, 1993, p. 1). To do this, I have repeatedly listened to the data I have collected and transcribed, noting that a “…methodic transcribing, often leads to insights that in turn shape how we choose to represent an interview” (Riessman, 1993, p. 60).

In this process of writing up my findings I hope to become a very powerful storyteller – one who can retell participants’ accounts of experiences in ways that may impact the institution and how it does business in the future. Given this is qualitative research, I see myself as an “instrument” and expect to be “interpretative in [my] quest to find meaning [and] use language to communicate – allowing for voice to emerge – and pay[ing] attention to detail and subtleties within a particular context” (Thurber, 2004, p. 489). I will argue that the most important way for developmental strategies to emerge is through stories of the institutions told as vividly and interpreted in ways that might help improve both participant and institutional advancement. The museum will only thrive if,
as Stankiewicz states, we use the past to create the present, and more importantly, in my opinion, the future.
CHAPTER 4

DATA FINDINGS

This chapter describes two house museums studied, based on each institution’s primary document (incorporation documents, mission statements, program and marketing materials and board minutes), city/county demographic data, and participants’ testimonies. These multiple sources collectively constitute the data considered in answering my thesis question, what is a successful historic house museum. The chapter is divided into three sections. In section one I explore the Copperfield House and Garden board and constituent demographics and professional backgrounds, city and county context, history and structure of institutional governance, auxiliary boards, committees, agency mission and purpose, general development practices, educational programs, and community impact. In section two I repeat the preceding cycle, exploring the same content and order of data for the Perry Museum. I will also occasionally foreshadow issues analyzed in Chapter Five across both house museums. In the subsequent chapter I will reference this descriptive data as I analyze each and then compare and contrast the two institution’s strategies for developing financial and programmatic sustainability.

Board Dynamics

It is important to note that given the changing nature of board leadership, perceptions reflected in this study could vary if the same research procedures were to be followed in a subsequent year. All interviews referenced in this thesis were conducted
between March, April, and May of 2008 at a time when both institutions were preparing to induct a new group of board members. Readers are therefore reminded of the limitations of this study as, in part, a reflection of the subjective insights and standpoints of the specific participants interviewed. The same questions were asked of all subjects at both museums (questions may be found in Appendix A), including those concerning general development practices, governance of the museums and how both affect the way it does business. Additionally participants were asked whether or not they considered the museum’s programming successful, what impact it had on its community and how it responded to that community. Finally leaders were asked about their overall perceptions of historical house museums and how they might succeed in the future.

Previous research has shown that board “myths” need to be debunked and organizations must start with the basics to create a productive, passionate board (McDaniel/Thorn, 1994, p. 43). Basic regulations must be re-visited, hierarchies need to be broken down, the mission must be understood, and the staff of the institution should be considered a voting member (McDaniel/Thorn, 1994, p. 43). McDaniel and Thorn promote a whole holistic structure they contend is better for working governing boards of many arts organizations. The following diagram considers how their model can be applied to historic house museums.
One of the most important aspects of board involvement and development is that of more holistic thinking of how what the individual board members do affect the community they are serving, or “the good of the broader community” (Adams et al, 2003, p. 123). By doing this, not only will a museum begin to form relationships for collaborations, but will be better able to find connections to get resources, including funding.
Copperfield House and Gardens

At the Copperfield House and Gardens, the range of participants’ ages varied from 25-65, with the average being 43.4 years old. Copperfield’s parent organization, an international service auxiliary is comprised exclusively of women volunteers. The average salary of interviewees was $55,166. Their racial and ethnic composition includes Caucasians, African Americans, and Hispanic populations, with the majority of subjects being White. I conducted 11 interviews in person, two over the telephone, and secured additional input from various auxiliary participants via e-mail, the latter consulted only to aid in understanding the composition of the Auxiliary and how it influences the house museum as an institution.

This institution’s interview subjects varied in terms of education and professional career trajectory. Many had earned undergraduate degrees, with some having advanced diplomas, including those with Masters Degrees in Business Administration and one PhD in Economics. Professional backgrounds of participants varied from consulting in various fields, event planning, and non-profit development work, to photography, health administration, education, information technology project management, and interior design. Participants also varied in their depth of experience and time invested in the Auxiliary. Many were in their first or second year of volunteering, a few were sustainer members (or those who have been involved more than eight years), and one or two had been involved in the Auxiliary for more than twenty years. The balance of interviewees was neither new members nor sustainers. The Executive Director has been a part of the Auxiliary since the 1980s.
Located in a mid-sized Midwestern city, of just over 700,000 people (2000 census, city website), the Copperfield House is located near the downtown business district of this city I will call Walterson. The largest portion of Walterson’s population is between the ages of 21 and 24, a reflection of its being home to one of the nation’s largest universities. The city’s median age is 30.6 years (Walterson Facts, 2008). This will be important data to consider as it is analyzed in the subsequent chapter. Another important aspect is the county’s racial diversity, with Caucasians constituting 67.9% of the population and 24.7% being African American (Walterson Facts, 2008). The Copperfield House has appeal to the African American community, in contrast to the typical historic house museum, serving a largely Caucasian upper, to middle class (Wise, Interview with Staff, 2007). Another distinguishing characteristic of the city is its large land-mass, of 225.9 square miles (Walterson Facts, 2008). This expansive dimension has posed a challenge when the museum’s advertising has attempted to attract the city’s residents as visitors, as well as visitors to the city. Finally, the student and school population will be an important factor to consider, given there are 437 schools in the county that educate over 170,000 students attending them (Walterson County Fun Facts, 2008).

A Brief History of the Copperfield House, Family, and Museum

The Copperfield House and Gardens was built in 1852 when it was the last home on Main Street (a major traffic corridor), and was surrounded by farmland (The Copperfield House, 2008). The family hosted a stop on the Underground Railroad during the Civil War, housing many runaway slaves, (including one who lived with the family until she was married after the Civil War). This protected woman who formerly had lived
in bondage shared a relationship with the family that still resonates today with museum visitors engaged in its educational programming.

The museum itself was founded in 1977 as provided in the will of the last surviving family member (who had lived in the house during the early 1900’s), when she passed on in 1975. A granddaughter of the original family who had built the home, she designated that both property and the home to “be devoted to charitable and educational purposes worthy of its quality and history.” She further called for its use as “a museum for the decorative arts and history and for the study of local history and for the cultural and educational activities of the community and its institutions of learning” (Copperfield Will, 1975). Various local groups and institutions were approached to help fulfill the wishes of the granddaughter’s will, including an art museum, the local historical society, and a nearby university (Wise, A1b, 2008). Only the University appeared at first to be seriously interested in acquiring the property (wanting to use it for not only a museum, but for housing for visiting professors), but they soon backed out soon after seeing the house’s state of disrepair (Wise, A1b, 2008).

According to the granddaughter’s will, the home was to be torn down within six months of her death if nobody acquired it. A local chapter of an international service organization within Walterson (that I will call the Key Auxiliary) was then approached in 1976 to see if they would be interested. Given the demise of many local historical homes during this time, the Key Auxiliary determined this would be one of their projects (Wise, A1b, 2008). They were then left with the entire property and about 80% of the original family’s belongings – items that would subsequently be used to tell the home’s story and serve as the heart of the museum (Wise, A1a/A1b, 2008).
The Copperfield House is still operated by the Key Auxiliary, a group paying $1/year to the local foundation that is responsible for executing the Copperfield granddaughter’s will (Wise, A1b, 2008). The Key Auxiliary is a 501(c) (3) non-profit organization while the Copperfield House is not (Wise, A2a, 2008). The board of the Key Auxiliary is also the governing board of the Museum. Within the auxiliary, there is a team that works with the staff on a regular basis in overseeing the day-to-day operations of the museum. The auxiliary members are assigned to the team as part of their required yearly service hours. Assignments are based on the member’s interest and Key Auxiliary needs. The team is charged with fundraising and program oversight – from facility rentals for weddings and other special events, to school and different service group tours, and historical re-enactments, among other museum uses. Given this significant overlap of interests, I interviewed a mix of both Auxiliary Board Members, team members for the Copperfield House, and two of its staff members who also happen to be Key Auxiliary members.

The Key Auxiliary teams include a Board of Directors that is comprised of a president, president-elect, treasurer, treasurer-elect, and various vice presidents who head their specific team, one of which is a team for the Copperfield house. Auxiliary members are classified as provisional (members in their first year), active (those in their second year and beyond), and after eight years of service an active member qualifies to become a sustainer. After achieving sustainer status members are required to do less community service (Wise, A1b, 2008).

There is also a community advisory board within the Auxiliary that is composed of community who offer their in-kind gifts of expertise in their chosen profession (Key...
Auxiliary Fact Sheet, 2008). This advisory board has served in enhancing the programming at the Copperfield House throughout the years by giving legal advice, monetary guidance, and marketing opportunities.

Copperfield House and Gardens and Key Auxiliary Mission and Purpose

The mission and purpose of both the Key Auxiliary and the Copperfield House and Gardens is important to define to better understand the educational programming, general development practices, and the subjective outlook of the subjects interviewed for this research. The museum’s mission is to:

…interprets urban life and the decorative arts in [the region] during the second half of the 19th century, largely through the collection of [the] family. Reflecting the culturally diverse nature of the past and present, the Museum preserves and develops its facility and collections, interprets local history, educates the community and trains volunteers. The Museum provides a tangible representation of the mission of the [Key Auxiliary]. (Copperfield Home Page, 2008).

Founded in 1923, the Walterson chapter of the Key Auxiliary has been practicing their mission for almost 90 years now. The mission of the Key Auxiliary is:

an organization of women committed to promoting voluntarism, developing the potential of women, and improving communities through the effective action and leadership of trained volunteers. Its purpose is exclusively educational and charitable…[and is achieved through] collaborat[ion]s with members of the community to address issues that make a lasting impact on individuals' lives. (Key Auxiliary About Us, 2008)

Both of these missions seem to align, but issues with their alignment will be explored in depth in the analysis of the data.
Fundraising and Development Practices

The Copperfield House and Gardens currently has a budget of approximately $130,000. The museum, as an institution, is charged with raising about $112,000 of that, and the Key Auxiliary volunteers to do the rest. It is important to the Staff and Team of the Copperfield House to raise as much of the initial $130,000 budgeted themselves, so as to not burden the mother organization (Wise, A1b, 2008). According to Marcia Evans, the Treasurer of the Auxiliary, tasked with monitoring Copperfield House spending, it has five main streams of revenue (Wise, A2a, 2008).
Figure 4.2: Five main revenue streams for Copperfield House and Gardens as presented by Treasurer Marcia Evans

These are 1) visitor revenue (admission paid by people visiting the home), 2) rental revenue (weddings and other events held at the museum), 3) donations from individuals (those in the community of the Auxiliary), 4) corporate and foundation funds (grants for
specific projects or programming), and 5) Auxiliary funds that offset any expense not covered through the first four streams (Wise, A2a, 2008).

The part-time Executive Director, Christine Black, is charged with ensuring that all the money the museum spends is authorized through the correct Auxiliary channels. An adequate separation of duties is ensured through a check authorization process in which the *team* Vice President of the head of the museum team approves the Executive Director’s request and then forwards it to the Auxiliary Board’s Accountant, who in turn issues a check in payment of that museum expenditure (Wise, A1b, 2008) (See Appendix D and E respectively for full budgets of the Copperfield House and the Key Auxiliary).

The Auxiliary produces special events that supplement Copperfield House and Garden income. In the past, there has been just one end-of-the-year gala (begun in 2004) (Wise, A1b, 2008). Last year, however, the team decided to hold three smaller fundraisers, an initiative met with mixed reviews. According to Jenna Weaver, a first year team member, the three small events were to appeal to different groups of people – expanding efforts beyond those who came to a black-tie event, and as an attempt to not compete with the Auxiliary gala, which was held around the same time as one of the newer fundraisers. These events included a Halloween adult costume party in the Fall, a sit-down dinner in the dining room of the house in the Winter (using the actual plates and flatware of the family that lived there), and an early evening Spring garden party with wine-tasting at the director’s home (Wise, A3b, 2008). Combined these events made about the same amount of money as had the one Gala in previous years (Wise, A1b, 2008).

*Programming and Community Impact*
The programs of the Copperfield House and Gardens all center on the story of the family that lived in the house. The basement of the house is the primary program site that is dubbed the Underground Learning Station. Part-time Educational Coordinator Elizabeth Young discussed the different elements of this particular program and shared the history of how it was developed.

The Underground Railroad Learning Station developed because the [Copperfields] were part of the Underground Railroad. As a docent for the first three years that I was a part of this organization, I found that that was a piece that was fascinating to people. Ears perked up and you could see that this was something that intrigued them. And so, as I moved into more leadership positions, the director and I would talk about this from time to time, and when they asked me to do the Vice President position, I talked to the Director if whether or not she thought we could bring this off in the time that we would have during my tenure, because nobody else is really at that point was interested in it. So, we brought together a really diverse group of people all over the city. We had educators, we had people from [the University], we had people from the library, we had teachers, we had individuals from the links organization, and we all came together for about 7 months, once a month and we created this program. The program itself runs an hour and a half – thirty minutes of it is a tour of the house, thirty minutes of it is a fictional story of the Underground Railroad, with a workbook [that] has elements of the [state’s] core curriculum adapted into it, so that it meets criteria for the teachers as well as entertains the students and educates them, and finally the centerpiece is a thirty-minute theater presentation. The reason that we know that the [Copperfield House] was a stop on the Underground Railroad is the [Pierson family]. [Sonya Mayfield Pierson] at the age of ten, ran away from a plantation in [the South] with her sister. She made her way here, was too ill to go on any further, so her sister went on to Canada, she stayed here. She lived here with the [Copperfields] until her marriage and they, she and her husband had two children. They had [Oliver Copperfield Pierson] and [Betsy Mae Pierson], and [Oliver]’s son Thomas is still alive and [Mr. Pierson] documented his family’s story. Now we have taken that family story and created a play that’s done by the children from the [Arts and Academic high school]. And, that is the centerpiece drama. If they are unavailable, we have an actress who plays [Wendy Copperfield], who tells that same story. Or, we have an actress who portrays Sonya as an adult looking back on her life. So the key to the whole program is the true story of a child so what makes this program unique and I really think what makes it so popular, and a growing vibrant program is that we have the story of a child to tell children and often times by children. So, it connects and tells historical story that is true because most kids really want to know “Is it true?” And, it’s also a way to bring history down to their level, if you
will. Most history is about adults and is faraway times and faraway places. Children have very difficult time relating to those adults, but when you can tell them a story of someone their very age, they can put themselves into that position and empathize on a level that they simply cannot do when it’s an adult (Wise, A1a interview, 2008).

The Learning Station program is the most popular program sponsored by the House. The majority of field trips that visit the Copperfield House partake of the program, and about 5,000 school aged children came through the house last year alone (Wise, A1a, 2008). The actual cost of producing the program runs about $8 per child, but $5 of that is subsidized through the Museum and Auxiliary funds, thus enabling students to come for only $3 (Wise, A1a, 2008).

Of the other programs that the Copperfield House does is its Second Sundays tours led by Underground Railroad re-enactors who portray a different historic figure each month, like Sojourner Truth or Frederick Douglass (Wise, A1a, 2008). There are also special tours geared for older audiences including one about a “secret” in which visitors are led through the house by a young White girl living there who repeatedly tells participants that she has a secret. The secret is, of course, that there is a runaway slave hiding down in her basement (Wise, A1a, 2008). The Museum also hosts other events like its formal and etiquette-driven activities that include teas and dinners for different occasions (Wise, A1a, 2008). During the holidays, Copperfield House has various programs showcasing its Victorian decorations, and ghost tours around Halloween (Wise, A3b, 2008).

Overall, the programming efforts of the Copperfield House and museum leave an educational impact on the community of Walterson. Some board and team members felt there was also some economic impact on the community from event rental sales, and
visitors to the home, but overall, in the eyes of one interviewee, that impact is “negligible” (Wise, A2a, 2008).

Current Strategic Planning

The Copperfield House and Gardens recognizes the struggles they have with being part of a larger governing organization and in the past year has completed another phase in the Museum Assessment Program for the American Association of Museums (Wise, A1b, 2008). This Governance Assessment Report contains information of interviews from both board members of the Auxiliary, the staff at the museum, and the team members. It spends a lot of time dealing with the pros and cons of having the Auxiliary serve as a parent organization for the house and gardens. In the end, the recommendation of the assessment report is to keep the Auxiliary in place for the time being to help support Copperfield and its programming efforts (MAP Governance Assessment Report, 2007).

Primary Struggles and Issues

Some of the biggest challenges discussed by research participants included making more people in Walterson aware of the museum, marketing it to different audiences, redefining the governing relationship with the Key Auxiliary, changing perceptions people have of the Auxiliary, in ways that might entice more outside funding, and replacing lost corporate and foundation support that has recently been awarded to other organizations in the city, and finally, the city itself poses a challenge in its involvement in cultural activities.
The Perry Museum

At the Perry Museum, I conducted a total of ten interviews, with nine of those being board members. Fifty percent of these interviews were with female participants. The average age of the members interviewed was 60.4 years. The age range of interviewees was from 30 to 80 years. The average annual salary of these subjects is $61,500 including the three who were retired, and all were Caucasian (one being a naturalized citizen born in Germany). Eight interviews were conducted in person and two were by phone.

The professional backgrounds of Perry Museum participants interviewed include two who sit on the city council where the museum is located. One is retired and one who led strategic leadership training at the other large university in the Grand River Region. Two participants were nurses, one was a Certified Public Accountant, and two worked for the local University (one in the Development Office). Educational backgrounds aligned with each subjects’ professional careers, some holding advanced degrees. Many of the Perry Museum board members held office for at least two or three year. A few were ready to step down after six years of service (members are limited to two consecutive three-year terms). The board includes one University representative, one city Council representative (the museum coincidently though has two members from the city council, one being the official appointee and the other just having a strong interest in the museum and history of the community and wanting to serve), and a new appointee from the city school district (a high school athletic coordinator). The Perry Museum’s Executive Director had been on the job for two years, but was about to relocate given a spousal job change.
The Perry Museum is located in a small independent city, of almost 16,000 in a Mid-Atlantic, southern State and is located on the main street of the place I will refer to as Huntington (Huntington City Information, 2007). The city is situated in the rural mountainous Western region of a heavily populated State and is home to a mid-sized public University, with about 9,000 students (Huntington City Information, 2007). This population and region will be important to consider as the data is presented. The city is 9.5 square miles in size, but is an independent city, meaning it is not within the governance of a county, just the state in which it lies (Huntington City Information, 2007). It is situated between two other counties, which make up the region of what will be referred to as the Grand River Region.

Figure 4.3: Map of Grand River Region, showing “independent city” of Huntington
Within this region, there is another public university which has about 29,000 students (About Large University, 2008). This is another important aspect to keep in mind as the interviewees perceptions are presented and discussed. Educationally speaking within this small city, there are is one school system with four schools and approximately 1500 students (Huntington City Information, 2007). The average city resident’s age is 23 years old, (a statistic obviously influenced by the university), with approximately 23.5 percent of the population being over 45 years of age (Huntington City Information, 2007).

A Brief History of the Perry House, Family, and Museum

The Perry House was built in the 1870’s, right after the Civil War by a Confederate General for his wife - a woman whose last name was Huntington, the city’s namesake (Wise, B1a, 2008). He named it Perry after the region his family originated from in Europe. The land for the property was given to him by his future father-in-law, who also built another home, important to the Perry House and the Grand River Region, one I will refer to as the Emerson Home. The Perry House is a Victorian home with some Federal style features, and was maintained as a residence by members of the original family until about the 1960’s (Wise, B1a, 2008). After that time, the home was deserted and left on the property of the nearby company that creates electric motors (Wise, B2e, 2008). One of the board members for the Perry Museum used work there and explained that the home was there deteriorating on the company’s property and eventually was bought by the city. In the 1990’s, a group of people established the Huntington Heritage Foundation and began plans to restore the historic home into a museum (Wise, B1a, 2008). With money the city of Huntington received from selling a parcel of land, they
purchased the Perry House and began its restoration. Originally budgeted and funded at only costing $250,000, the restoration of the Perry home was inevitably an almost million dollar project, all paid for through the city of Huntington (Wise, B2b, 2008). The Perry House was subsequently opened as a museum in 1997.

The Perry House Museum has an independent board of directors and a part-time museum director. The Huntington heritage foundation oversees the business of the board, but is merely there as an umbrella organization. The house itself is owned by the city, which provides about 40% of the museum’s annual budget (See Appendix F for full Perry House Budget 2008).

![Figure 4.4: Percentage of Revenue for Perry Museum](image)

The city provides maintenance to the house, including everything from shoveling sidewalks in the Winter, to fixing its plumbing or repair needs (Wise, B2a, 2008). The
Museum also relies heavily on volunteers who are recruited from the general public, the university, and students from the nearby school.

**Perry Museum’s Mission and Purpose**

The Perry Museum is part of the Huntington Heritage Foundation and their missions are one in the same:

The mission of the [Huntington] Heritage Foundation is to identify, document, preserve, and promote [Huntington] heritage, the past and the present, for the future. In keep to this promise, the foundation operates Perry Museum and is actively engaged in other preservation projects in the area (Perry Museum website, 2008).

Through both the Perry Museum and the newly undertaken project of renovating the Emerson home, preservation of heritage and history in the rural area is realized. These findings will be analyzed more in the following chapter.

**Fundraising and Development Practices**

The Perry Museum operates on a small-scale budget of $27,000 per year, with about half of that going towards paying the part-time director. Besides the approximately $10,000 in operating support from the city (see Appendix E), the Perry Museum’s other streams of revenue for the Perry Museum include membership dues, individual donations, event fees, and book sales (Budget for the Perry Museum, 2008). Additionally, grants are regularly sought and utilized, with three being received in the last year for both programs at the Perry House Museum and pay for repairing the roof at the Emerson home (Wise, B1a, 2008).

The Huntington Heritage Foundation has worked hard in 2008 to create a large fundraiser at another historic home in the area. Almost all the subjects interviewed mentioned this fundraiser prior to it happening, very hopeful about what income and
interest it might produce. This event was designed to generate interest in preserving local history to leaders and community volunteers, alike. It was held in the early Spring, as a black-tie optional, heavy hor d’oeuvre, evening gala event. Tours of the historic home hosting the event were given during the ticketed event and presentations were made of the leaving Executive Director and other board members. This hopefully, beyond raising money, helped to stimulate interest in both the history of the region and the Perry Museum itself.

*Programming and Community Impact*

The programs conducted by the Perry Museum include school tours, summer camps, lecture series, exhibitions, some events for local groups, and community festivals held on the grounds of the home. The Director at the Perry House, Henry Forrester, has really taken great strides to improve the standards of learning that school-aged children field trip experiences at the museum. By working with the College of Education at the University, Forrester is making sure tour programs can be directly related back to the State and school’s standard course of study, and further address high-stakes history tests students must take. These end-of-year exams were imposed upon teachers as part of State’s response to the Federal No Child Left Behind Act (Wise, B1a, 2008).

The Huntington Heritage Foundation is the main contributor to Huntington Heritage Days, a community event held annually. The Foundation also sponsors a lecture series that’s produced three to four times each year, produce newsletters containing stories and historical anecdotes, and have undertaken the huge project of restoring the Emerson Home. This current project is already in its initial phases with the Heritage Foundation’s has to restore the roof. The Emerson House has been in some disarray for years and has
been used mainly for storage by various groups throughout its decline in the past six or seven decades. Its rich history needs to be reinvigorated and this structure needs some genuine care to ensure this. Some specific plans the Huntington Heritage Foundation has for this rehabilitation is exterior repairs, like window replacements, plumbing, heating and air, electric, transportation access, and creating a parking lot. A private grant was obtained to replace and repair the roof in 2007, but there is much more work to be done if this historic structure is to be of the best use to the entire community (Wise, B1a, 2008).

Starting in January 2008, the Huntington Visitor Center was opened in the Perry House Museum, a development impacting the surrounding community (Wise, B2a, 2008). The new cohabitant of the building has resulted in fewer volunteers being needed to make sure the doors were kept opened. A product of this development is that more people are stopping by to get information on the City and Region and while in the house, some take a tour or ask questions about the Perry Museum (Wise, B2a, 2008).

**Current Strategic Planning**

The Perry House has recognized the need for strategic planning and in the past year, since the new director came on board. The Board has developed an in-depth plan for the future. Basically drawing from a S.W.O.T. Analysis (Strengths, Weaknesses, Opportunities, and Threats), the Board has identified areas of need, which includes improving their marketing effectiveness and improving their technological capacity. They spent time during a board retreat, and utilized the skill sets of one of their board members who used to do strategic planning for a living to come up with these areas of need and set goals for the immediate and more distant future (Wise, B2a, 2008).
Primary Struggles and Issues

When talking with Perry Museum Board Members and its Executive Director, the same issues were mentioned again and again. First and foremost, the Perry Museum faces a lack of community interest by its rural region residents. Secondly, its relationship with the City Council has, at times, been tested. Thirdly, board constituent diversity is an ongoing concern, as its need to develop a cohesive marketing and branding strategy – one that pinpoints its audiences and purpose. Since the area in which the museum resides cannot be changed these may continue to be challenges that need to be resolved.

Closing Comments

While there are very similar aspects to both house museums, they are starkly different, and require some different development strategies. The starkest difference between the two is where the museums are located and the size of their communities. Copperfield House is dealing with a much larger area and a more diverse population. The Perry Museum is situated in a much more rural setting and has a smaller population, even within the Grand River Region. Similarly though, both cities of Huntington and Walterson have universities that impact how the museums sees its programming responsibilities. The houses have much different financial issues, with there being more than a $100,000 difference between the two annual budgets. But in general, they seek money from the same mix of sources and deal with a parent organization that either controls or could limit their access to funds.
CHAPTER 5

DATA ANALYSIS

Through interviews with constituents at both case study institutions, this narrative research has recognized these participants’ perceptions of development and fundraising strategies, issues, and ideas for sustaining their respective museums. While some of their issues are shared, each institution’s different history and governing structure and surrounding communities and marketing focus define their different struggles and opportunities for public recognition. In this chapter, I will separately examine each museum's issues and attempts to resolve problems, and by building on their founding missions and developing programs and development strategies that serve them.

Copperfield House and Gardens’ Issues

Key Auxiliary Governance

The most prominent issue for the Copperfield House is the relationship with its governing organization, the Key Auxiliary. Almost every constituent interviewed described both the pros and cons of the Auxiliary as a parent organization. Overall, participants see the Auxiliary as an asset, and offered ways of addressing its negative implications. The Executive Director of the Copperfield House and Gardens, Christine Black talks about the “perks” of the governance structure from a volunteer’s standpoint, while also recognizing it as a time-consuming demand of her job:

Way on the plus side is the fact that there are waves of volunteers that come to us through the [Auxiliary]…I have this constant flow of people coming in. Now, on the training and orientation side, you have a whole new people to train and orient every year. Which is not easy. I mean, most people don’t come to us with a
museum background. It’s very time-consuming to be constantly orienting people to what is a museum, what is our function, what is our mission, how do we operate, what is our responsibility, what is our fiduciary, all those kinds of things…so that’s a challenge. (Wise, A1b interview 2008)

Christine also notes the board of the Auxiliary’s lack of museum knowledge, a factor making it harder for them to understand the amount of money that is needed for upkeep and maintenance of the house and its collections.

On the negative side, the board in the [Auxiliary] in general doesn’t have a whole lot [with] experience of museums and how they function. And, like all boards, and I’m on other boards in the community, board members don’t always understand their responsibility to be supportive. (Wise, A1b interview, 2008)

In her opinion, the relationship between the Auxiliary and museum has been cyclical:

[F]rom ’82 until now (that’s a long time) there’s been ebbs and flows in the support for the museum from the board. There have been very difficult times when the pendulum has swung so far to the museum that there were people who were intrinsically involved with other projects who were angry because they weren’t getting any attention and any money, so the pendulum swung back. I think it’s kind of in the middle now, but honestly each time the board population changes, you’re faced with a whole new group of people and unlike most boards who usually have three year repeating terms, so a maximum of six years, the board members are only on there for a year. Now, a few of the people have elect positions, so they have a possible two year of influence, but that’s really still nothing compared to the kind of longevity that should be part of the policy making of a board. (Wise, A1b interview, 2008)

Marcia Evans, an Auxiliary board member, and part of the Copperfield House team, sees the relationship between the museum and the Auxiliary as strictly involving fundraising:

…we have our own problems. We are a training organization so women are learning how to do things. We are terrible at asking for money, we are terrible at raising funds. We ourselves are learning our way. It’s not like we have this lean, mean machine of “This is how you do it…” We struggle on a yearly basis to raise money efficiently and effectively and to reach out to corporate people, so we
struggle. It doesn’t surprise me that the [Copperfield House] struggles. We overall both need to be much better at it. But it’s not like we’re over here sitting on the other side of the ledger doing this incredible job…we’re not. (Wise, A2a interview, 2008)

Frances Gelman, a newer team member for the Copperfield House was able to explain how this financially impacts the museum:

It’s sometimes a challenge to make a balance between the needs of the parent of the organization…[Key Auxiliary] and what they would like the see the [Copperfield House] do, as opposed to things that the [Copperfield House] itself would like to…do. The two might clash in terms of how to achieve [their missions] because a lot of the activities do depend on league members [in the] volunteer organization to pull off a lot of the fundraising events. Unless that structure changes to have more of a dedicated staff that does that beyond what currently is there, you sometimes outstretch your resources. (Wise, A3d interview, 2008)

Jenna Weaver, a team member, thinks that the staff’s past involvement as Key Auxiliary members helps create a good working relationship with the Auxiliary. She also states however, that there are not a lot of consequences for Auxiliary members who do not fulfill their service requirements to the Museum.

That’s a volunteer issue…if you decide to just drop your placement and just never show up, there’s not a lot of ramifications…it’s one of those things where, that’s something that the [Auxiliary] has to look at actually…it’s a problem across the board. Everyone has sort of a renegade committee member who never shows up, but yet every year they’re still in the [Auxiliary]. (Wise, A3b interview 2008)

As a volunteer issue, commitment and interest within the Auxiliary is a matter, the Executive Director, Christine Black, has to address, picking up whatever slack is left over. Labor not covered by volunteers can hinder the museum’s basic operation and prevent her from doing her job.
I really do everything that pertains to the administration of the house…Some years it depends on the strengths of my volunteers, they do a lot of the work, other years, I do almost all of the work. (Wise, A1b interview 2008)

Within the Auxiliary, there is a lack of understanding of what the Copperfield House does. Many team members noted this problem to me when interviewed, including Jenna Weaver:

And you know, there’s two budgets that’s involved in the [Auxiliary], I mean, sorry, within the [Copperfield House]. There’s the operating budget and there’s like a capital improvements budget. And that always causes some issues when people in the [Auxiliary] hear you know, “I heard that they’re repainting the museum shop, why are we doing that, why are we spending money on that?” There’s a separate budget for that. People do need to understand that there are two different pockets of money that people have invested in. (Wise, A3b interview, 2008)

Jenna asserted that Auxiliary members were being stretched in too many directions, and therefore not supporting the Copperfield House as much as they could.

…we’re also being asked constantly to support other [Auxiliary] events. So that’s kind of an issue. I think, and sometimes the relationship seems strained. I don’t think the [Auxiliary] is connected enough to the [Copperfield]. (Wise, A3b interview, 2008)

Ellen Diaz also commented on the Auxiliary’s lack of knowledge about the Copperfield House:

On an individual basis…a lot of people in the [Auxiliary] are really dedicated to the [Copperfield House] and really see value in [it] but…a lot of the people in the [Key Auxiliary]…are not aware that the [Copperfield House] is supposed to be the flagship project. They are not aware that the [Auxiliary] is the governing body for the [Copperfield House], and…people don’t really know a lot about the [Copperfield House]. So it’s kind of become…the ugly stepsister, [or] more like the forgotten child. (Wise, A3a interview, 2008)
Board member, Stacey North, described this lack of concern by framing the Copperfield as an “island” of the Auxiliary (Wise, A2c, 2008). She also noted that the Key Auxiliary, as far as she knows, is the only one in the world that operates a historic house museum as one of their projects, making it harder to find help when they need it, in terms of knowledge and support.

Team member Tonya Curry also sees the Auxiliary as taking on too much and needing to take a step back and re-evaluate what their focus should be.

Some of the [Key Auxiliary] members stepping up to say “hey, this is our signature project, we need to make sure it’s still going” and it’s putting in more of an effort to the [Copperfield House] than anything else. They need to step up and put an emphasis on it as opposed to coming up with more new projects when that one might last. (Wise, A3c interview, 2008)

The Copperfield House definitely recognizes this struggle, and as discussed in the data findings chapter, their current strategic planning process has involved outside consultants to help them figure out what their next steps the Key Auxiliary should take. Should they stay with the Auxiliary or become an entity all on their own? It seems as if they realize the perks that being with the Auxiliary offers also comes with limitations.

**Generating Community Interest**

Because the relationship between the Copperfield House and its parent organization, is shaped by perceptions of the surrounding community, it has an impact on how they will be involved (if at all) with the museum and its programs.

Ellen Diaz, a team member, answered my Copperfield House funding question,

The [Auxiliary] is usually funded by junior leaguers…they spend the money…and they bring their friends to the events, so there’s not a lot of community involvement…. [the gala] is for Auxiliary people. Not that that is the intention, but that’s how it works, that’s how it happens. We would love it if
people from the community actually attend and spend their money. (Wise, A3a interview, 2008)

Marcia Evans, a board member for the Auxiliary paints a picture of what people’s perceptions of the Auxiliary are, and how they might be hindering outside community involvement:

I think there’s the potential perception…the museum is run by the [Auxiliary], and if your perception of the [Auxiliary] is a bunch of rich, white women wearing pumps and pearls then you possible would say, “Well then you don’t need money,” (Wise, A2a interview, 2008).

Jenna Weaver, another team member, agrees this perception has limited success in getting others in the community involved, and has strained the parent organization’s resources.

We have gotten younger and younger. And we’ve left the old mentality. We say, “Not just pumps and pearls.” It’s kind of a joke, because that’s what people think…“Oh, the [auxiliary]…must be all these old rich women.” It’s not. We now actually have a lot of women in their twenties. (Wise, A3b interview, 2008)

The Education Coordinator Elizabeth Young sees this new, younger profile of Auxiliary member as limiting who she has to help volunteer for school tours and other group tours.

…we have had to grow our volunteer base. This program only works if we have a volunteer base. The problem with the [Auxiliary] is…that the majority of [Auxiliary members] work….The stereotype is women staying home, making tea, and having parties, but that is not the reality. Seventy-five percent of women in the [Auxiliary] hold jobs outside their home. The other twenty-five percent are probably at home because they have small children, so they’re not an ideal volunteer base for me. As a result I have had to reach out and find other community volunteers. (Wise, A1a interview, 2008)
Copperfield House and Gardens’ Executive Director, Christine Black offers the mix of museum members’ financial involvement. “I would say 2/3 [of the] people who are [Auxiliary] members are also Friends of the [Copperfield] and about 1/3 [are] community people who are just people who like us” (Wise, A1b interview, 2008).

Jenna Weaver sees this as a burden on the Auxiliary members, especially in terms of both time and money.

We’re sort of being pulled in many directions…I would probably be surprised if I actually sat down and figured out how much money was spent on the [Auxiliary] this year. And the more involved you get, the more people ask you for money…we’re also being asked constantly to support other [Auxiliary] events. So that’s kind of an issue…sometimes the relationship seems strained. I don’t think the [Auxiliary] is connected enough to the Copperfield. (Wise, A3b interview, 2008)

Because the Copperfield House museum is part of a larger service organization, it has been hard for it to shake the image of being its funded program when appealing for money to the larger community, or when seeking involvement of those outside the Auxiliary. As noted above, these are issues that beg the question of whether or not the Copperfield should split from the Key Auxiliary as their parent organization, and if that split would help the museum to secure greater support or participation in programming by the Walterson community.

Community Limitations

Because it is in a larger metropolitan area, the Copperfield House and Gardens is continually competing with other arts and cultural organizations for funds. Marcia Evans spells this out,

…in terms of a visitor base, [in which] I think we experience different things, [and] from a fundraising base, [in which] we’re all in the same boat (which is you
know, do people wish to support the arts in whatever base there is). And you know, that really kind of ebbs and flows with how our economy is doing, what else is being asked for, so I think from a fundraising standpoint, we probably have very similar things...From a visitor standpoint we’re probably, slightly different, you know certainly much more similar to the symphony or the art museum and compared to what you’re going to get from a [Major League Soccer] game, but if it’s someone saying I’m going to the art museum or the [Copperfield House], then we probably have some differentials as to why someone would choose one over the other. (Wise, A2a interview, 2008)

The educational coordinator, Elizabeth Young also sees this issue as one where the museum could develop.

...there’s a lot options in [Waterson]. There’s a lot of alternatives. And, so, it’s a little bit harder [for the museum to distinguish itself] because it is not the focal point. Smaller towns, it might be the big thing going on. We tend to be a pretty small fish in the big pond of [Waterson]. Our needs are not as great...of the corporate givers in town are committing their funds to the [other arts organization] which means that there aren’t funds, we are obviously not in such dire straits, thank goodness, but by the same token we suffer as a result of their position. So, when you are in a town the size of [Waterson] you are in competition for not a lot of...money...We compete against the art museum and [the science museum], and we do that for attendance as well as corporate giving. (Wise, A1a interview, 2008)

Given Waterson is not considered a “destination,” the city is continually working on building up its tourist base, and Copperfield suffers a lack of visitorship to the city.

Marcia Evans and other team members mentioned this when being interviewed:

...particularly in a community like [Waterson]...[it is] not necessarily a destination place...it’s not like we’re having tons of tourists coming through every year...we are still a huge metropolis, but I can pretty much guarantee one one hundredth million of a percent have not visited the [Copperfield House], so we have no draw upon our own location. (Wise, A2a interview, 2008)
Although this percentage presented is probably substantially lower than those who do know of the Copperfield House, it is still very little to garner wide-spread popularity to come and visit.

Just because Walterson is a larger metropolis, doesn’t mean people are crowding cultural institutions’ doors. From the above statements, it is clear that the Copperfield Museum is struggling to compete for funds with other organizations in the city, as well as for visitorship. When a historic house museum is in the same city as large art museum, a large science museum, a large zoo, botanical gardens, various performing arts groups and numerous sports teams, it is hard to get the corporate, or foundation support needed from year to year. It is also a challenge to get people excited about and interested in history. Given Walterson is not a destination city, but has been said to be a great place to live, local residents would seem to be the ideal audience market for the Copperfield House, rather than the visiting history-loving tourist. From the statements above, new ideas are coming to light, as well as older ones being re-visited both by the research participants and myself as the researcher as to where the Copperfield could draw upon using Walterson as an asset, as well as realizing and working within the city’s limitations.

*Carving out a Niche*

Because of its location, the Copperfield House and Gardens is continually struggling to compete with much larger, more popular attractions. Sometimes, they lack the interagency relations to collaborate with these institutions, and are instead virtually competing with them on every level.

Ellen Diaz, a team member at the Copperfield House recognizes this lack of collaboration:
I see less promotion in some of the other areas where you might see like…reciprocal system[s] within the museum of art, or the historical society…those kinds of things are, I don’t know if they are specifically museums, but they are typically things that you would think that you could do [to advance] reciprocal promotions…not a lot of people in the community know the [Copperfield House] unless they have school-aged kids. (Wise, A3a interview, 2008)

Ellen explains what the museum can do to find its place within the community;

…a successful house has a core message that they’re trying to present and that the public wants to come and see…you can have a traveling exhibit that can try and do that, [but] the value in a permanent museum, regard[s its] education [programs]. Developing education [programs] that are always changing and morphing …so…it can continue to be interesting instead of ok, you go visit when you’re six years old and never go back. That’s how it can be valuable. Every time you go, you learn something new, something different and that it kind of develops as [Walterson] develops. (Wise, A3a interview, 2008)

Repeatedly informants assert that the museum deals with the community of Walterson as being a limitation, and its people as being rarely interested in coming in the museum. Many constituents interviewed said they need to find that hook, beyond their Underground Railroad Learning Station, to bring in other audiences besides those school-aged children and women who are the typical audience of the Copperfield. The museum does have a large task at hand in attempting to distinguish it against numerous other arts and cultural organizations, and those more popular attractions like athletic events, concerts, and shopping malls.

*Marketing Focus*

The Copperfield House represents a niche market for certain audiences, but is trying to attract new sectors of the population, like young professionals, tourists, and
working adults. Elizabeth Young sees a place for such newer audiences in her educational programming.

…we’re constantly thinking about our educational programming, or at least that’s my job strategically to think about it. During the past couple of years, we have been so busy growing what we have in place and developing the adult programming that we really have not strategically thought about the next few years. That being said, I actually have talked to some of the…former board members about developing, sitting down as a group, a group of interested people. Perhaps even some of the original people who were involved in developing…a five-year rolling strategic plan. We don’t have a vision. We have an operating plan, but we really don’t have a five-year strategic plan and I think that the piece that we would like to put in place next year. (Wise, A1a interview, 2008)

Jenna Weaver, a team member of the Copperfield, generally thinks the museum lacks focus, and doesn’t have strategy in place for marketing.

We haven’t, I think something that would really build it, would be to have a marketing meeting plan for the house, you know a funding plan. And we don’t really have that. I mean, the league has a strategic plan, with pieces built in. But no one has really looked at it and said, “Here’s all our funding streams and here’s what we have to go after.” (Wise, A3b interview, 2008)

Jenna, along with some of her colleagues at the Auxiliary, also discussed some of the problematic issues with the wedding and other event rentals.

The problem with weddings there is, you know, if you’re going to have a 300-person wedding, the [Copperfield House] is nowhere near going to be able to do that…the area with the gardens. That is a tent-able area. We’ve never done that at the house. It would take an investment to buy that…I don’t think people want to compromise the gardens, people can get too close to that. So you know, it’s sort of whether you make a decision to change something dramatically, or you don’t. (Wise, A3b interview, 2008)

Ellen Diaz, personally was more positive and considered this issue a rental marketing opportunity.
I can tell you that one of the big funding sources for income is rentals for special events, but again, we don’t really promote ourselves. For example, I’m getting married and I’ve been to a couple of bridal shows and [Copperfield House] is a bridal venue and they weren’t at the bridal show. (Wise, A3a interview, 2008)

There was some discussion about the museum shop. Jenna again had some thoughts on ways of improving what the Copperfield currently offers in its museum shop:

…we have things like the museum shop, where, it’s kind of there, and [yet] there’s nothing [at] all that exciting in there, like “I like history,” and there’s nothing there that I feel like is really great or that I would really want to have. But again, that’s the whole, “We don’t want to spend the money on something that isn’t really going to pan out…” [mindset]. (Wise, A3b interview, 2008)

Various issues still hinder the Copperfield House museum from being “successful”. The governance of the Copperfield House by the Key Auxiliary hinders the community interest in the museum. The limitations of the community start with the governance of the Key Auxiliary, as well presents its own issues. This, in turn, lends itself to having problems with marketing themselves out in the Walterson community; the Copperfield needs to find its niche within the community of other cultural organizations before it can begin to think about different and new marketing techniques. Overall, the Copperfield House and Gardens, has to examine all these issues at the same time, putting emphasis on the biggest ones first to understand and improve the remaining, more detailed ones.

The Perry Museum Issues

Board Governance

The Perry Museum’s Board of Directors lacks diversity. As committed as the current leaders are, they might be more likely to have connections with a diverse group of
people if the board reflected that diversity. The Board has recognized various organizational strength and leadership issues in past years, and is making strides to improve both.

Executive Director Henry Forrester arrived at a time when he was most needed, and recognized the improvements that need to be made.

I think we are at a stage where the board needs to grow. Like where board development is essential...because you get burned out if you do too much...[we need] more board members, from more diverse backgrounds, not only racially, but younger board members, more board members from the University...[Historically] there was...the Heritage Foundation and a museum management committee [that] kind of took a path of their own, meaning that they kind of became a separate entity. They had their own accounts and stuff. The foundation didn’t like it, so it started a clash...[where] the committee...who were very committed people, very strong organizational people, really made things happen, they just left. So there was kind of a drain, a “brain-drain” on the Board and what I came in...we had kind of a bare bones Board left over. (Wise, B1a interview, 2008)

Another issue Henry sees the organization facing is its working dynamics within the Board of Director and continuity amidst frequent turnover and transitions (especially since he was preparing to leave his position at the time of his interview).

To not only the board, but in the director or whatever staff positions, they can’t pay that much, so there’s high turnover...the one director has built up something that might be...and there might be a gap. The knowledge is going to be lost...one person builds up something and then leaves and doesn’t submit the information, what they’ve done and the new person starts and changes the priorities and so forth. (Wise, B1a interview, 2008)

He also sees where the lack of experience and diversity on the Perry Museum’s current Board of Directors impacts it is not fulfilling its full fundraising potential.

Something in our board development, we don’t have fundraiser types on our board; we have more of the workers that make things happen, but not those who
have the connections that can talk somebody into giving. (Wise, B1a interview, 2008)

Felice Hall spent some time discussing board diversity with me and the similarities between all of them as a hindrance to what the museum could be accomplishing.

If you look at each age of the board members, I think there’s…I’m at the younger end of the range of the board members, so I also feel like there’s a lack of diversity on the board now...again, it’s like the small community phenomenon. (Wise, B2g interview, 2008)

She also spoke of how the board leadership influenced what decisions gets made and how that impacts the work with the staff at the museum.

There are so many variables…working with a limited budget and you have the director, or staff, and my impression is that if you have a paid director or whatever, they still tend to be short-lived…part of that has to do with upwards mobility. I think part of that has to do with the challenges of working with a volunteer board, many of who are highly, highly invested emotionally, and financially…[This is a] huge challenge…if you have someone who is bringing money to the table, or potential of bringing money to the table, then you have that person weighing very heavily in decisions. (Wise, B2g interview, 2008)

As talented as the board participants were at the Perry House, it could utilize more of the community on their Board, which, in turn, might increase community involvement.

It seems to this researcher that the Board of the Perry Museum might benefit from restructuring and reformatting how its Board does business, beginning with its own constituent diversification.

Community Limitations

The Perry Museum financially struggles in several areas, one being the limited resources of the small rural area in which they are situated. Henry Forrester, the
Executive Director of the Perry Museum described his museum within the context of others of the Grand River Region.

We, obviously, we have a small [area]...our problem and this is compared to other museums in the area, I think a lot of them...have a large endowment. Usually how these things get started, the owners of the house, some kind of wealthy family...want that preserved. They give us the house and a big pot of money that’s the endowment, and you can draw from that. That’s not the case here. There’s no endowment at all. So, there’s no cushion, so to say, that you can fall back on. So...every single year, we really have to meet our budget goals because there’s not a lot of reserves. (Wise, B1a interview, 2008)

Henry also understands the sometimes not as stable relationship the museum has with its parent organization, the city of Huntington, who owns the house museum building.

We do have a contract with the city and understanding where certain goals are spelled out and we have to reach so many visitors, so many tour groups, so may whatever... we show our value to them and they decided to keep our budget going...we need to show certain results. We have done that in the past, so that’s no problem right now. Obviously we are also always dependent on general city budget situation. If there’s not much money, we might suffer too. Actually this year because this is a bad-year economic-wise, [Huntington] has a budget crunch...It was not expected but we succeeded in securing our general funding. (Wise, B1a interview, 2008)

Other board members see the community having a perception of where these funds should be going and it’s not to the museum, especially from a historical standpoint. Jack Hanson recalls what happened when the city originally funded the restoration of the building:

The city had to spend more on the restoration than they originally thought. And so, there were some people who were really angry that the city was spending its money and it took a long time for that to wear off...I don’t think anyone is still mad, but it took awhile. A lot of work to put all that money in the building. (Wise, B2a interview, 2008)
Felice Hall, an active Huntington community member, spoke of the community’s size impact on the Perry Museum.

Fundraising is the number one challenge of every non-profit...we’re all trying to find the signature event and out of all the different organizations...it’s basically the same people on the same board...there’s a competition and [given] the rural nature of where we are, it’s really tough to be successful. (Wise, B2g interview, 2008)

Hall also spoke of the small “pool” of museum resources and how it might be a huge detriment for successful fundraising.

People want the success of their organization and the success of Huntington and the community...people support each others’ events and fundraising whatever really well. The pool is small...everyone hits up all the banks...you can’t just go down and say, “I need $200 for this.” They have to put it into their plan that we’re doing this, which is fun, but we’re just not used to that culture. It seems to be hitting up the same places over and over. (Wise, B2g interview, 2008)

Having a large University (compared to the size of the city) right in the middle of Huntington also creates development strains on the Perry Museum, as Felice elaborates:

You’re also competing with [Huntington] University’s foundation office, which has been pretty successful, particularly in the arts...the Dean of the College of Visual and Performing Arts has done a really good job with money for the arts, with scholarships and grants for performers, so especially with the arts, I think the [Huntington] University Foundation and working with [the dean] have kind of picked those pockets, which is good. It’s big and official, but...you know, [a local bank] for example is a big supporter of the arts at [Huntington] University, but then I think they feel like that’s all we’re kind of doing in the [Huntington] community. (Wise, B2g interview, 2008)

Shirley Jensen, a former leader on the Perry Museum board also remarks on the scarcity of corporate sponsorship.

We don’t have the corporate sponsors that I’d like to see us have...I suspect that it’s because we have a limited pool of sponsors in this are and everyone goes there and asks for sponsorships, so I think that they give as much as they can, but
you know, for the most part, they’re small and they can’t give to everybody. (Wise, B3a interview, 2008)

Not only does the Perry Museum struggle with being located in a small community, tucked away in a rural area of a southern state, they also face competition among historical institutions. There are a lot of historical sites and other areas of interest for visitors, making it hard for the Perry Museum to distinguish itself and gain visibility. The Board Members of the museum recognize this as an issue and realize they must be creative if they are to overcome a location the museum cannot change.

Generating Community Interest

Since the museum is located in a community where there is a sizable younger generation population (due to the mid-sized university situated within the city), the Board recognizes the need to get more involvement from the student body, and generate greater historic interest among the general community. Henry Forrester recognizes this issue and is working with the Perry Museum’s limited funds to ensure more people know about it.

There are always people who are like, “I didn’t even know it was there.” And I mean we are really trying to reach out. We’re doing all kinds of free advertising...we’re trying to get to schools, and so on, but I think for people...if they aren’t interested in history or not involved in the community, if they don’t look out for postings, they’re never going to get involved here, especially if they are not interested in [Huntington] or interested in [Huntington’s] history...But of course our mission is to promote and preserve [Huntington’s] heritage and history and if you’re not interested in that, or you think it’s boring, then it’s going to be really hard to make interest there. But I’m writing articles about history and...we have made progress in attracting new members. (Wise, B1a interview, 2008)

Board member Michael Robertson also sees how community involvement has declined throughout the years, and suggests what needs to be done to improve the museum’s image.
One thing…you can look at the current salary structure, we have one employee that’s [paid] considerably less than what we paid a director, about three directors ago. The problem was, a director was [hired to run]…a capital fund drive. We did a basic study of the community and found about 3-5 million dollars of untapped resources within the private sector and private businesses within the community. That didn’t materialize. We paid the director, [until] we exhausted some reserves. The community as a whole knows about that, they heard about it, they created their own rumors about it. If you’re paying the director that kind of money, you don’t need any more. The other one is, if it costs you that much to restore the museum, we’re not going to put any more money into restoring any other buildings. Do it on your own. So, it all comes [down to financial [matters]. What we feel we need to do is make ourselves more visible with programs that are geared towards all aspects of the community. That could be towards children, the standards of learning; it could be something geared towards high school students, college-aged students. What would attract a college aged student to go to the museum? Look at your own age, it is your interest to go, but look at some of your friends…what can you do to get them interested versus well, we’ll wait until we get to retired age, then we’ll get their interest – there’s something for all age groups. (Wise, B2b interview, 2008)

Felice Hall, also remarked on the perception of exclusivity that a lot of community members have about the Perry Museum.

Some of the community thinks that Perry Museum is draining money from other programs that the city should be offering…This is also because the [Huntington] Heritage Foundation…tends to be, “these are the old families of [Huntington]” and if you’re not an old family of [Huntington], then you’re not invited or wanted. That perception is not accurate, but it’s a perception. (Wise, B2g interview, 2008)

Hall suggests that it is not so easy for the general public to recognize the museum’s value; a challenge that could be addressed by explaining the tangible benefits of funds people donates to the non-profit.

I have a much easier time selling, or trying to convince [the public]…[to support] needs…[Museums] creates economy…it’s a way to create jobs, to create an economy, to feed people, be down at the basic level, and clothe them and house them…so it’s important you know that it is as immediately tangible and I think that’s the hard part. (Wise, B2g interview, 2008)
Shirley Jensen, a former board member, also recognized the challenges facing a non-profit cultural institution like the Perry Museum.

People [who] give in this area are very generous and they give to causes that [provide] food, clothing, and shelter, basic needs. It’s more difficult to convince people that they need to give for their psychological needs, their social needs, whatever needs a museum meets. So, we’ve had to work very hard and it has been difficult. We started sort of from ground zero. We didn’t know how to go about the fundraising and a big part of it has been convincing the public that we are a strong, stable organization and that we are here to stay and that we do good things. Once we achieve that goal, it became easier. In our fundraising, we have had varying degrees of success, [but] we needed to figure out what the market was…what we offer that they would support financially. (Wise, B3a interview, 2008)

While the Perry Museum struggles to get people in the door, they have made a concerted effort to get more University students involved and generate interest outside of the city of Huntington. The Heritage Foundation of Huntington is also acting on these efforts, and has conducted surveys that show which exhibitions were of greatest interest to the community. But they have yet to figure out long-term strategies for getting more regional community involvement.

**Narrowing the Focus**

The Perry Museum Board recognizes the need to both utilize all their niches, but at the same time recognizes it must narrow or concentrate its area of programming as a “selling point”. Jack Hanson, a Board member, acknowledges this as “historical tourism”:

We also are more focused. We aren’t trying to be all things to all people. We are focusing on the history tourism. We’ve said that in our mission statement now and are clear of what we are about. (Wise, B2a interview, 2008)

Michael Robertson, another board member also speaks of their original and current intentions as a “historically focused” institution.
What we said is, we know we have a specific interest, we know we have a thought of where we wanted to be. We know we want to be historically focused, so we looked in the community and said, “Ok, we know these people are interested in history and historical preservation, so we did an invitation of those people to an organizational meeting. (Wise, B2b interview, 2008)

This is a great step for the museum, but it seems that history covers a lot of ground and being in an area where history abounds, their mission might need to focus even a bit more narrowly to help entice funders to buy into what the museum is trying to accomplish. Given the small, historically significant region, finding this niche seems essential to their success.

*Carving out a Niche*

The Perry Museum is trying to distinguish itself in a community, rich with history where they constantly compete with more enticing activities and natural landmarks of national historic significance. Jack Hanson, a long-time board member spoke in-depth of the museum’s ideas for “historical tourism.”

The river is a big thing…it has a historical impact. It’s the second oldest river in the world…Two major Indian trails cross here in [Huntington as]…the [Grand River Region] was common hunting ground…The Scotch-Irish and German came to settle here…[so] the museum can address the very early, the pre-colonial…the colonial time…we were [once] an Indian frontier town…You’ve got the Civil War, since the house, the owner was a Confederate General and that of course develop quite a bit…then you’ve got the impact of the second World War…all of these things we’ve just barely tapped. (Wise, B2a interview, 2008)

Michael Robertson suggested ideas for re-defining history and describes what a museum experience could be for the people visiting the state and historical area surrounding the Perry Museum.

You have to re-define what a museum is and what history is...It’s what happened yesterday…so what can we do here to attract them? We think museums [are] one
way to do that and we keep trying to recognize that when you mention museum, a lot of people immediately think of what a museum is. They’ve had an experience somewhere. A very stuffy, dusty, damp, dark, facility that has the same exhibit I saw 10-20 years ago. Museums of today are not that, but it’s hard to get that image out of their head. (Wise, B2b interview, 2008)

Michael also noted that Huntington and the Grand River Region need to be re-defined, or at least looked at differently.

...the idea is you have to look much beyond Huntington, because if you look at Huntington and only Huntington, you only have 15,000 people. And the thing I use time and again, it’s not just the museum, it’s with everything that we do as a community...because we are an independent city, we have a tendency to look at ourselves as an island because we are not part of a county...you need to identify that we’re a part of a bigger something and let’s find out what that bigger something is, and then you can say, ok, here’s where we’re coming from folks...if you keep talking “island”...and that’s all you talk about, you’re not going to get anywhere. (Wise, B2a interview, 2008)

Shirley Jensen, a former board member understands the Perry Museum’s limitations, but contends it can compete with the surrounding area attractions.

My experience there has been so positive and we have a lot of free reign in what we choose to offer to the public – what exhibits we bring in...[but] because we are small we can’t offer great elaborate exhibits like a large museum can, but the we have museums offering something smaller and more intimate, more close-up and personal. (Wise, B3a interview, 2008)

Not only would finding this close-up and personal museum experience niche within the historical region be helpful to the Perry Museum, but finding a niche for their small city of Huntington and region of the Grand River would also be useful. In affirming its niche, the Perry Museum might be able to reach more citizens within the community. Again, building upon its assets could result in more local community interest and member patronage, important possibilities for an area that does not attract many outside visitors.
Public Recognition

_Copperfield House and Gardens_

Since the Copperfield House and Gardens has been in existence as a museum since the 1970’s, it has been publicly recognized numerous times and in many ways. The museum’s historical story has been featured across media outlets, and appears a venue worthy of elite touring exhibitions. Karen Lipsky, a long-time team member spoke of a Smithsonian exhibition that traveled to the home years ago (Wise, A3e, 2008). Although she could not remember the date, she remembered it as being most important in her almost two-decade involvement with the house.

Another media vehicle that recently recognized the Copperfield House was a History Channel contest where, a specialized tour was to be voted as most creative (Wise, A3c, 2008). This helped the museum secure exposure not only state-wide, but Nationally. Another TV-centered article of publicity was a 25-30 minute piece released on PBS a few years ago, in which the director of the house was interviewed. Team member, Jenna Weaver noted of the niche market the Copperfield House leverages to secure its recognition – a niche that is appealing through its advertising to the masses needs improvement and development, in her opinion (Wise, A3b, 2008).

The Copperfield House has been recognized locally; featured in monthly publications (sometimes just photos in the society section of regional magazines), to routinely ran local newspaper pieces on the house and its upcoming events (Wise, A3e, 2008). Various team members mentioned that the historic home has also collaborated with the local tourism bureau as a featured destination within the city.
In terms of financial recognition, the Copperfield House and Gardens has received major grants from large corporations in the past few years, mainly for educational purposes, since, as the education coordinator explains, “It’s a very easy concept to understand” (Wise, A1a, 2008). The Auxiliary has held silent auctions in which items auctioned varied from paying for a classroom of students’ visit to the museum, to gift certificates donated from local businesses. Grants to subsidize transportation costs, she said is, “a very easy thing to understand and [donors] open up [their] checkbook and write that check” (Wise, A1a, 2008).

The museum has also been publically supported through a Capital Campaign conducted in the late 1990’s to fund the parking lot, and making improvements to the home (Wise, A1b, 2008). This campaign alone raised approximately $1,000,000 (Wise, A1b, 2008). The Copperfield House has, unfortunately, lost a large grant from a major bank just this year, and as a result is working even harder to apply for various National grants geared towards history museums (Wise, A1b, 2008).

The Copperfield House is known in the community and regarded publicly as an event space (particularly for weddings). Although this niche could be developed further, a lot of the team members felt that when the public was asked about the Copperfield House, many thought of it primarily as a weddings and events space (Wise, A3b, 2008).

According to almost all of the Auxiliary team and board members, the museum is known for its school trips and the many young lives it touches throughout the Spring when students come to experience the Underground Railroad learning station. The Copperfield House and Gardens is banking on that exposure, to help it increase its visibility in the community and reputation as a purposeful and valued entity.
It seems as if the Copperfield House and Gardens is on its way to being a recognized entity. Various populations including young students, women’s groups, and garden clubs, are aware of the programming at the Copperfield House, but it is other sectors of the Walterson community that now need to be reached. Various methods for accomplishing this will be discussed in the Development Strategies section of this chapter.

*The Perry Museum*

Given the Perry Museum’s smaller rural community, it has had a hard time receiving the recognition, benefitting thriving institutions. Many of the board members interviewed did not feel the community understood why the museum was there to begin with. Since roughly half of the community are students in residence only nine months of the year it, they appear disconnected from the local population. According to Felice Hall, an employee of the University, the few students who do get involved in the museum are only involved for between a semester to two years, and then they are gone. Even when they are involved, it is hard to keep them or utilize them as volunteers, because many are over-involved in campus activities as well (Wise, B2g, 2008).

Many children in the city travel to the museum for field trips. But in a small region in the city’s four schools, other schools take field trips to the neighboring towns’ house museums and their larger University (located twenty minutes away). In short, the Perry Museum is not the region’s main source of historical education or heritage preservation. Redressing the low museum attendance, the Perry House now serves as home to the city’s visitor center. The exposure it gains from people visiting the city and
the Grand River Region has increased its recognition in the local community, and at times in the State (depending on the visitors’ residence).

There are other ways the Perry Museum is being recognized, even if not through its own efforts. The main artery of the city is the Grand River, the world’s second oldest river. Two of Perry Museum board members sit on various community and regional boards, and they too have helped establish Huntington as a “River City.” Hopefully the Perry Museum will increasingly be using that branding when developing its programs.

Other historical and geographical features of the region also help distinguish the Perry Museum. These features include various historical Indian trails that intersect in Huntington, and the natural surroundings that bring many scientists to the region. The railroad yet is another vehicle that attracts visitors to explore the city. The historical significance of the railroad within the region will only benefit the types and quality of exhibitions the Perry Museum may plan, hopefully drawing people to their doors.

The hiring of a successful Executive Director has provided leadership that has also fueled Perry Museum’s exposure. Henry Forrester has not only the experience and creativity to expand its public appeal, but according to his board members, he has a personality that has been embraced by the community. Without the leadership of this Executive Director and his Board, the big spring event (held at another historical home) might not have helped promote the Heritage Foundation or raised money, for the Perry Museum.

The Perry Museum’s financial position has improved greatly over the past decade. According to many of the board members, increases in membership have yielded a positive cash flow for the foundation, which is now operating in the black. The museum
has applied for many grants and received three major ones in the last fiscal year that will help support the foundation’s programming. These three were for the restoration of the other home, the Emerson house (Wise, B1a, 2008).

Like the Copperfield House, the Perry Museum is now on its way to greater fiscal stability, but nonetheless it is still dealing with obstacles to receiving the recognition it deserves from its community. To this author it seems as if the Perry Museum’s focus needs to narrow a bit, if it is to entice more visitors and financial contributions. The Perry Museum needs to market differently both within its small community and in the larger region (with competing historical landmarks of significance). Collaboration and promotion ideas for the Perry Museum will be presented in the Development Strategies paragraphs of the Analysis section below.

Founding Documents

*Copperfield House and Gardens*

The Copperfield House and Garden’s main founding document is the original owner’s granddaughter’s Last Will and Testament. After the Auxiliary took possession of the property, its members looked at their missions and established the Copperfield House Museum in alignment with those and the wishes of the home’s last remaining family member. Since its 1923 founding in Walterson, the original purpose of the Auxiliary has been “actively improving our community and training volunteers who make a difference in the lives of others” (Key Auxiliary *Our History*, 2008). Since in the Will of the family heir of the Copperfield House affirmed that the house “be devoted to charitable and educational purposes of its quality and history” and that, “the creation of a museum…for the cultural and educational activities of the community and its institutions of
learning…‖, the Auxiliary found its perfect “project”, (Copperfield Will, 1975). The match seemed to be inevitable. The lease between the auxiliary and the community foundation (that technically owns the home) states that the Auxiliary may “use and occupy the premises in a careful, safe, and proper manner” for $1 a year. (Copperfield Lease, 1975).

Since the Auxiliary’s mission for projects met the requirements set forth in the Will, the Copperfield House and Gardens became its educational branch. Analysis of the organizations’ documents indicates that both their programming and educational fundraising have been successful. Getting grants to subsidize costs for school children visits, and improving their Underground Railroad learning station have been the core of its educational efforts to date.

The Perry Museum

According to the Huntington Heritage Foundation’s articles of incorporation it was founded to help establish the museum. The purpose of the Heritage Foundation is to, “identify, document, preserve, and promote [Huntington’s] past, present, and future through preservation of our historic landmarks, promotion of local history through education, and to enable our members to make a greater contribution to their community, State, and Nation” (Huntington Heritage Foundation Articles of Incorporation, 1993). My historical document research shows that the Huntington Heritage Foundation “has the authority and the responsibility to operate a museum, among other responsibilities” (Huntington Heritage Foundation Founding Documents, 1993).

A Museum Management group was then created to help establish the museum, and oversee the restoration of the Perry home. This museum would be:
“for citizens of [Huntington] and the [Grand River Region] community. To collect, maintain, preserve and promote exhibits and collections pertaining to the heritage of [the state’s] western region by focus on the [Huntington] area and its people. To further the education about and appreciation of the rich heritage of the [Huntington] area and western region. It is the obligation of the management group to assume the responsibilities for collections, which are held in trust, for the benefit of the present and future citizens of this community and region. To train and to provide docents to keep the museum open and to obtain volunteers to help with projects”. (Perry Museum Management Group Bylaws, 1993)

Legal documents within the City of Huntington, confirm that the city supplied the majority of the money for the house’s restoration and still provides almost half of its annual operating budget. A “copy of action” from the city of Huntington states the following:

The city of [Huntington]…has received a Deed of Gift from [site specific] corporation, dated November 27, 1996…of property and improvements including a structure known as [“Perry”], which Deed of Gift requires the city…to renovate. (City of Huntington Copy of Action, 1997)

The City Council resolution specifies those tasks the City and Heritage Foundation would undertake, once they acquired the house. This action called for a “Facilities and Operations Committee” that could be “recommending to the [city council] and the [heritage foundation] on matters relating to the facilities maintenance, repair, utilities, insurance, and other such matters as may, from time to time, be related to [Perry]” (City of Huntington Copy of Action, 1997).

Since 1997, the Heritage Foundation has done just what it was organized to do, preserving history and educating citizens to their heritage. Other aspects of the original founders’ intentions might need to be altered to create a more successful historic house
museum, like concentrating the focus on a specific story, telling and broadening audiences to a regional-base.

The question of “what constitutes a successful historic house museum?” could be answered in many ways, but when the participants were asked, many offered the same answer. First, and foremost, success is defined by the entity’s financially stability. The second dimension of success was that a historic house museum transforms every individual that crosses its threshold; changed by having learned something from their museum visit. Whether it was something each learned about history, the community, or themselves, visitors were expected to be impacted by visiting the house museum. Staying true to their mission and playing a pivotal role in their community were the third and fourth success indicators most frequently offered.

Development Strategies

After triangulating all my interviews, learning about the museum’s public recognitions and awards, and researching the founding documents of both institutions, I now offer the following suggestions for ways of improving these two museums; recommendations that could also be applicable to similarly sized historic house museums.

Collaboration

Many interview subjects from both museums proposed ideas about collaborations. Felice Hall, a board Member at the Perry Museum suggested collaborating with other non-profits in their small rural region as a way of demonstrating that organizations can be supportive of one another and less institutionally competitive. Through such collaborations they could help ensure their events and fundraising activities do not conflict and most importantly, that such cooperation would demonstrate to potential
funders and the community that nonprofits were utilizing all resources and worked together to ensure the financial viability of other cultural entities. Another subject suggested this might even involve hiring a professional fundraiser who could be co-contracted by the six or seven major non-profits in the area (Wise, B2g, 2008). But they must be wary of this, given their past issues with overpaying an executive director and wanting donors to know and trust how their money is spent.

Ellen Diaz, a team member at Copperfield House and Gardens suggested the idea of creating a reciprocal program with other arts and cultural organizations in the city of Walterson (Wise, A3a, 2008). Karen Lipsky, another team member took this a step forward to see how the Copperfield could participate in a reciprocal program with other historic house museums in the state and even the country (Wise, A3e, 2008). A lot of the subjects interviewed spoke of utilizing untapped resources and really getting deeper involvement from outside their community. Elizabeth Young is currently looking to the large university in the city of Walterson as a site for recruiting volunteers – specifically those in the Education Department who could help with tours (Wise, A1a, 2008). This population might also help during those daytime hours when volunteers are needed most and Auxiliary members could not help due to work or child care obligations (Wise, A1a, 2008).

In Huntington, utilizing the resources of the college-aged volunteers enrolled in different museum and history course taught at the university is a strategy already employed. Michael Robertson, a Board Member at the Perry Museum, suggested conducting a survey (an idea presented first by the Heritage Foundation), so the group
would know what types of programs might be of interest to those young adults they seek as volunteers (Wise, B2b, 2008).

Another strategy for addressing an area in need of improvement that both museums could employ is building political connections. The Copperfield House and Gardens is prohibited from holding political events on its grounds (as stated in the will of the granddaughter who bequeathed the property), but there are certainly other ways it could ensure that politicians are aware of its programs and services as a cultural gem in the community. Patsy George, a team member at the Copperfield House, suggested making sure all the political players in Walterson are invited to all events, and possibly even enticing them to come down for a tour with some of the school-aged children (Wise, A3h, 2008).

At the Perry Museum, these political connections were already being locally realized (two of the Board members were currently sitting on the five-person City Council) (Wise, B1a, 2008). Another suggestion that might help ensure this was always the case would be to ask the City Council (if there is not a current representative on) to appoint a Council Member to sit on the Perry Museum Board. Another board member, Carmen Hughes, thinks that all of the City Council members should be present at all city events, including those at the Perry Museum. Such required attendance might enhance the community’s perception of museum and elected official’s involvement, but also allow the politicians to advance their own political agenda (Wise, B2h, 2008). Ellen Diaz and Frances Gelman, Auxiliary team members serving the Copperfield house, both posed the idea of creating an arts and cultural district, and having the Copperfield be its cornerstone. It could be a “historical district” or a “Village Street District” (the name of
the street on which the home sits), one that could help create a better sense of identity and structure development within the immediately surrounding community (Wise, A3a & A3d, 2008). The problem with this, however, is that the city of Walterson already has so many districts that even its creation would not guarantee the Copperfield House will make its niche. This idea of “distrification” (creating a district to ensure an organizations niche survival) has been an innovative strategy for positioning institutions, and is a matter discussed by the interviewer and various team members.

The idea of collaborating with other arts organizations and nearby institutions is a start for any cultural agency lacking creativity or the resources to follow up on projects or programs. Collaborations can ensure all involved are able to better fulfill their mission by utilizing the resources surrounding them. In such endeavors, however, an organization must be careful not to lose its sense of purpose or quality of programs.

**Marketing Techniques**

Various marketing techniques were recommended by constituents at both organizations. Karen Lipsky, a team member at the Copperfield House suggested the very simple idea of ensuring brochures go to travel locations like airports, hotels, restaurants that might attract outside visitors to Walterson (Wise, A3e, 2008). Another team member, Jenna Weaver, suggested marketing to and connecting with business owners who might be stirred by the story of the Copperfield House (like women business owners, or minority business owners) (Wise, A3b, 2008). These recommendations could further ensure that the mission of the museum appealed to commercial partners who might have yet to be tapped for both fiduciary and community support.
Both museums grappled with how many events they could manage, and still raise money. Historically, one of the museums held a large fundraising event each year (a Spring gala), but changed it in recent years to accommodate Auxiliary members (since it competed with their gala). The change was to ensure more audiences in the community would be served by the events. Since having one big event that made the same amount of money as the three or four smaller events, the excess labor invested might be seen to be an inefficient use of volunteer energy (Wise, B1b, 2008). A suggestion from this information is to alternate years of when a large event are held, rather than holding three or four smaller events. Hopefully, in the off-years when there are more events, the Copperfield could bring in other people from the outside community to participate.

Other suggestions from constituents included getting notes of personal testimonies from school children going through the Underground Railroad Learning Station (documents that could be used to appeal to funders or other community supporters) (Wise, A3b, 2008). Event rental booking options were also considered, including, the idea to have carriage rides around the city for wedding brides and grooms (Wise, A3b, 2008). Or, finally, focusing on earned income from the museum shop, sales of higher quality artifacts (like teapots, or antiques) as suggested by Karen Lipsky (Wise, A3e, 2008) is an idea of selling something representative of the house.

In general, the Copperfield House (or any house museum for that matter) will benefit from figuring out its target audience, and knowing how to appeal to its masses by advertising or spreading the word via bus tours, billboards seen near historical sites, or getting general articles in the press about the programs of their museum (focusing on tourist trades in hotels and restaurants, or filling racks of brochures). Having a table at
local festivals would also be another simple way to get an institution’s name out, especially at bridal fairs that cater to a younger audience (who in turn could help bring in a significant amount of money to the museum). Another idea is to model off the Sister City Program, where cities have counterparts across the world or country. This could be marketed along with the reciprocal program suggested earlier, where visitors could receive discounts at suggested counterparts or get a stamp in a passport as they visit different historical homes.

It is critical for historic house museums to understand how to utilize marketing within their community. Target audiences, or even general public, a museum’s hope to reach must be identified; a marketing plan drafted and consistently carried out. Strategies must be constantly re-evaluated and new ideas created to reach out beyond who the institution is currently serving.

New Programs

The constituents interviewed at both museums sought something new to market in their institution. Marcia Evans at the Copperfield House spoke about a “hook or a catch” to bring more people through their doors. Specifically, she recommended focusing on an “experiential learning concept” (as also previously mentioned by museum professionals Stephen Weil and Eileen Hooper-Greenhill) giving visitors an experience like that is offered in their Underground Railroad Learning Station (rather than just showing something, researching and finding something “fresh and different” that visitors can experience) (Wise, A2a interview, 2008).

The education coordinator at the Copperfield House sees opportunities for growth in terms of summer programming (which the museum currently does not do) which she
calls a big “niche” opportunity that while a great undertaking of financial and time-commitment could open more doors if successful (Wise, A1a, 2008). Just like other organizations in the city of Walterson, the Copperfield House could open itself as the premiere history summer camp in the county or city. Such youth-based (non-school) programming would appeal to a middle-class audience or funders eager to create greater access to low-wealth and minority communities.

Another suggestion a Board Member at the Copperfield House had was to remove programs, when the revenues are exceeded by expenses. Marcia Evans spoke about the rental program that the Copperfield undertakes:

I’m not sure for all the work and effort and for the amount of time it takes away from the director’s day and so on and so forth, that we are really netting enough. We either have to amp that up and have it become a true “Yeah, we’re making a lot of money on this” or maybe we need to really consider maybe this isn’t what we should be doing.” (Wise, A2a interview, 2008)

This is a hard question to answer when the rental income is proposed at over $45,000 dollars in 2008-2009 (see Appendix D). But still one must ask if this is as a successful form of fundraising if staff and volunteer labor value exceed $45,000 or 36% of income for the Copperfield House and like energies could create even more money if invested in the development of other products and services.

Other new program suggestions included a “garden hop” where people could visit the different historical gardens and parks in the district (for which there are a few), and thus draw on new audiences (Wise, A3g, 2008). Also, to improve the gardens, Libby Dahlgreen suggested investing in a fountain to make it more approachable to the surrounding neighborhood (Wise, A3g, 2008).
Unfortunately, programming does entail more funding, but with the help of marketing, and collaborations, some ideas could be so beneficial to a community and its children that they could be pitched to funders, patrons, foundation, and corporations alike. Without this constant regeneration of ideas intended to better serve the local population, historic house museums may lose their appeal, even for history lovers. Some attempts are bound to fail but in the process of creating new programs, museums’ constituents will be reminded of the institution’s mission, and what the museum can do for the community.

*Strategic Governance*

Both institutions researched in this study were posed questions designed to help the researcher determine what the relationship was between them and their governing body. Despite the two very different legal arrangements, both experienced tensions as their funding and support pendulum swung. There are still various things each institution could do to improve upon their current situations including involving political leaders, hosting media events and generally generating more funds.

Constituents at both museums talked about getting their governing bodies and primary funders in the door to experience and fall in love with the charm and character of the home. To ensure that might happen, there are a variety of specific ideas from Holiday theme events to observation of school tours.

Christine Black, Executive Director at the Copperfield House and Gardens, thinks one of the most crucial parts of her future success is to have her sit on the board of the Auxiliary (Wise, A1b, 2008). Currently only one person does; only the Vice President of the Copperfield House team has any governance powers impacting the museum.
Team member, Libby Dahlgreen thinks the relationship between the Auxiliary and the Copperfield House could have a better system of “checks and balances” especially when it commits funds while throwing events (Wise, A3g, 2008). This could be as simple as making note of how many people are coming and bringing just enough food (so as to not waste money). Altering program menus to ensure efficiency might be another way to position the museum’s value within its community. These are just better business practices, and very simple entry points to advancement that the Copperfield and other house museums could use to begin improving their governing relations.

At the Perry Museum, staff and volunteers had no suggestions as to how to improve city funding, other than making City Council members more aware of what is going on and encouraging them to attend events. The Board of Directors however, had numerous ideas, including creating a more diverse board and getting more representatives from various agencies or groups throughout the city. These changes could be utilized in ways that reconnected the museum to its community and ensured the Board served the needs of Huntington and beyond.

The Perry Museum Board believes they have a cultural gem in their small community, and they just need to get people to take note before community involvement increases. Their talent will not go un-wasted, but they need to improve further by diversifying their leadership and participant base by drawing in more populations across communities. By attending such matters the Perry Museum can begin to create a focus to which those involved in the organization will want to fund and support.
Summary

By confronting a house museum’s biggest issues, they can begin to unravel their lesser needs. Once that journey begins, they can then start looking at the smaller impediments to success. They cannot just take problems on one at a time, but must acknowledge how all of these problems are interrelated and may impact limited resources. Once issues are handled and creative support of volunteers and staff are leveraged, the agency’s leadership can begin to collaborate, in marketing, creating and strategically planning the museum’s future in educating young minds, and serving their communities. Only then will the museum as a whole begin to thrive.
CHAPTER 6

CONCLUSION

Through literature review on historic house museums, document research, interviews I have explored two institutions’ strategic approaches to fundraising and development of community support. Since their rapid growth in the 1970’s when many communities felt the desire to preserve and support their local history, the house museum boom began by restoring deteriorating structures with historic significance (Butler, 2002, p. 33). These house museums found their niche by developing interpretive experiences, like the Copperfield House and Gardens’ Underground Railroad Learning Station. Thirty years later, yet others still try to narrow their focus, mission and purpose to more deeply connect with their community, (such as the Perry Museum’s attempts to engage and inform people in the Grand River Region). Historic house museums suffered from the Culture Wars that began in the late 1980’s and as a result, needed to find new and unique ways to “sell” their story to funders to ensure their futures. Since that time, many museums have developed programs as “selling” points, educating masses of children and community members to area history and heritage, while others still struggle to find their way. The purpose of this research was to showcase successful house museum strategies for meeting their development challenges and to analyze the experiences of those in peril and in need of greater financial support.
By conducting two case studies of two very different historical museums, and cross-reading their experiences against previous research regarding such institutions, I was able to identify successful strategies that could be reinforced, as well as continuing challenges facing each organization. Participants interviewed attested to the many problems of running a house museum, from fixing antique fixtures, to updating antiquated physical plant infrastructure, like plumbing and heating systems. Both agencies understood those issues each faced in getting their respective community’s involved in the historic house museum, and recognized the limitations of community size, competing venues, and reaching new target audiences, like young professionals or college students. But by interviewing each museum’s Board members and staff, I was able to hear their personal experiences and histories with their particular house museum. The testimonies shared affirmed they met challenges by being adaptable, able to help generate new ideas and re-vamped old ones in ways that could help to improve their fundraising effectiveness and earned income development, like refining event rental policies at the Copperfield, or curating stale, boring exhibitions into ones that people might want to see (as in the sports exhibition at the Perry Museum). These narratives are the core data of my research. Hopefully just the process of reflecting on each agency’s approaches to income development has helped these institutions uncover their problems, imagine and create new strategies for improving their development practices. I do believe this research was helpful for both museums, as it allowed them to see their institution from an outsider’s viewpoint talking to a quiet observer of their institution who asked various open-ended questions (See Appendix A).
Some of the strategies and new ideas the agencies put forward addressed ways of improving marketing techniques, developing community involvement, creating new programs, and re-evaluating their governance structures. By being more aware of the governing structure of their museums, and collaborations with other local groups and cultural organizations subjects began to acknowledge how they could be part of both problems and solutions. The Copperfield House specifically had an idea for creating a “garden hop” for the historical neighborhood surrounding the museum. Another idea generated was as broad as completing a community survey to see what programs might be of interest to the younger generations in the Perry Museum’s Huntington community. These new ideas take money to implement, but if the idea is right, constituents at each organization may see increases in support necessary for propelling their museums’ educational purpose, and service to their respective community.

Although the literature (Caba, 1998) has shown that house museums could be restructuring their purpose and making their spaces more event-friendly, such restructured purposes requires fund investment – an expensive proposition that few Board and Team members on the Key Auxiliary for the Copperfield House recognized. Previous research (Wise, Interview with Staff, 2007) has shown that stand-alone or independent museums are more likely fail in fundraising to the extent that some must close their doors (Wise, A1b, 2008). My case studies affirm however, that even while a larger parent organization may ensure some economic security it comes at the expense of agency autonomy. Having others control a museum’s purse strings, (or at the very least, a large portion of the yearly budget) may be like the “pendulum” of fiscal support Copperfield House’s Director, Christine Black spoke about: a situation that may apply to
other historic house museums under the umbrella of a larger organization whose commitments may swing in any direction at any time (Wise, A1b, 2008). House museum governing councils’ interest can differ from year to year, or even month to month, and that is why it is crucial that house museum leadership be prepared to diversify income sources so they remain financially viable.

Implications for the Field

This research affirms three core concerns historic house museums must address:
1) that mission and purpose are forefronted in fundraising strategies, tactics, and potentialities; 2) that museums must understand their public value, roles and relationships within their community; and 3) that staff, board members, and volunteers repeatedly demonstrate their commitment to the historic house museum by engaging in critical assessment of their own work and ongoing skill development training. Research on Board governance (Adams, 2003) has shown the importance of organization leaders’ engagement in community relations efforts and in strategic assessments of organizational capacity.

…one of the challenges facing you is making a near constant reference to the place and role of your organization with integrity and excellence but also considering the impact of your action on the life of the broader community. It means continuously balancing organizational mission and priorities with the needs and priorities of the larger community of organizations. Perhaps most radically, it means a kind of organizational selflessness versus self-absorption. (Adams et al., 2003, p. 121)

First and foremost, historic house museums can focus on their public value and why they are important to their community. As seen with the Copperfield House, they must understand their value within the region and distinguish themselves as more than
just one historic house museum among many. The museum has claimed its niche by
telling the story of the Underground Railroad in their region of the State. The Perry
Museum is still struggling to define itself and develop marketable and popular
programming, but seems to already understand the need to evaluate their purpose and role
in the Grand River Region. Once they have realized their value and reaffirmed their
mission, then perhaps historic house museums will be better positioned to receive
funding from corporations, private foundations, and individual citizens.

Next, understanding where the museum has been and where it is trying to go can
help subjects to create more viable institutions. Completing basic S.W.O.T. (Strengths,
Weaknesses, Opportunities, and Threats) analysis is a great first step (as the Perry
Museum did) but a culture of continual assessment and critical reflection could
potentially result in sustained growth. The Copperfield House acted on such analyses and
realized the importance of strategic planning based on such analysis (it participated in the
Museum Assessment Program of the Institute of Museum and Library Services and the
American Association of Museums).

Finally, museums must improve their “business” practices and form stronger
relationships and coalitions throughout their community if they are to ensure future
funding. Several team members at the Copperfield House and Gardens have realized that
potential by tapping underutilized resources and collaborations with minority and women
business owners, and working within the political arenas to get government support were
just some of their specific ideas.

Parent organization subsidiaries’ and paid leadership’s lines of communication
muse remain open if conflict is to be reduced and cooperative programming is to be
enhanced. The Perry Museum, having such a small Board and community, is more adept at this, but the Copperfield House continues to find new ways to work with the Key Auxiliary in communicating ideas on ways of being as self-sufficient as possible and securing the necessary funds. Now instead of *selling* an idea, they must *market* to collaborators, creating experiences in the community, and acting on, what Stephen Weil (2002) claims is being *for* somebody rather than being *about* something.

**Additional Research**

Additional research on House Museum program and fundraising development could be done through other case studies, conducting more in-depth interviews over a longer period of time (such as up to a year at a single historic house museum), and interviewing constituents over a year on the Board, a team, or a staff member.

Looking at case studies from different U.S. regions could be of help, as could looking at house museums Europe, and reflecting on successes within each culture. Since each institution community situations vary, case studies done in all the regions of the U.S., struggling within a region could draw upon.

It is my intention as an arts and culture fundraiser in the United States to use findings from this research to help me better serve my constituents. The general principles of these specific development practices for historic house museums can be useful in improving the organizational capacity of any non-profit. By taking a better look at how organizations operate on the surface and below, organizations’ leaders can begin to compare how they could do the same. As historic house museums communicate their struggles, their opportunities, their challenges, and their ideas for the future, they can hopefully help others to become better institutions. By being aware of institutional
weaknesses, one can begin to realize future programmatic successes. Marketing those successes and helping the community see the agency’s benefit it can begin to “toot their own horn” as one constituent at the Copperfield House remarked.

I hope that when dealing with challenges, I will remember to critically reexamine my agency’s mission and its importance to the community in which it is invested. This will not only help the organization, but the surrounding community by helping to ensure the relevance of future artistic and cultural programming and appropriateness of the development undertaking.

Museums are among our most culturally significant institutions. They hold and preserve the treasures of the past, ensure they are not lost or forgotten, and help in educating those visitors who pass through the institution’s doors. Stephen Weil discusses the” new museum model” and why they matter in our communities.

Many still share the vision of an emerging new museum model – a transformed and redirected institution that can, through its public-service orientation use its very special competencies in dealing with objects to improve the quality of individual human lives and to enhance the well-being of human communities. (Weil, 2002, p. 130)

Historic house museums are charged with educating communities about their local heritage through the museum’s programming and rendering of history through interpreting its objects, collection, and exhibitions. By recounting the experiences of two historic house museums’ constituents, I have opened their institutional histories for others to contemplate. I may have just scratched the surface as to what makes a successful house museum, but have begun a critically reflexive process that will guide my own work in the future.
APPENDIX A

QUESTIONS FOR DATA COLLECTION
BOARD MEMBER/STAFF Questions

General information of interviewee/subject -

Age, race, gender, position at institution, history with institution, educational background, annual Income

Personal (subject’s) history with institution

General institutional background – governing organization, history, current fundraising strategies, membership, traditions, educational programs, public outreach, volunteer programs, annual income, campaigns for large donations, corporate sponsorships and relationships

-What methods does your institution use to sustain funding (i.e. private foundations, grants, government, etc.)?

-Do you supplement your income with any other sources (events, rentals, fees, etc.)?

-How does your house museum specifically implement development strategies, especially when original funding goes away (runs out, trust stops, etc.)? Are leaders called into re-evaluate the institution’s purpose or create strategic plans?

-What different struggles have you seen this particular institution go through (financially/organizationally specifically)?

What strengths does your institution have to make it successful?

-In your opinion what’s the biggest challenge of being an historic house museum?

-How does your house museum program to show economic impact - educational benefit? Community involvement, etc. - when trying to receive funding?
- Basically, how do you prove your worth to funders? How do you market yourself as a unique institution to receive funding?

- What do you think are the struggles historic house museums face that other arts/cultural institutions don’t face in terms of fundraising/sustainability?

- In what instances has your institution been regarded as successful (i.e. awards, public recognition, etc.) and how has it impacted your museum? (received additional funding, public support and validity)

- How would define a successful historic house museum? In your mind, what constitutes the longevity and public value in your museum?

Governing structure -

- What is the governing structure of your institution?

- Does it help or hinder the financial development of the museum?

- What relationship does the board have with the staff, and vice versa?

- How are the lines of communication between different constituents?

- How are strategic plans/governing documents put into practice to improve development practices of historic house museums
APPENDIX B

COMPLETION OF CITI TRAINING
CITI Collaborative Institutional Training Initiative

Human Research Curriculum Completion Report
Printed on Wednesday, July 9, 2008

Learner: Emily Wise (username: emilywise)
Institution: Ohio State University
Contact Information:
1375 Bayshore Drive
Columbus, OH 43204 USA
Department: Art Education
Phone: 614-292-7289
Email: wise.940@osu.edu

Group 2: Social and Behavioral Research Investigators and Staff.

Stage 1. Basic Course Passed on 11/03/07 (Ref # 1375903)

<table>
<thead>
<tr>
<th>Required Modules</th>
<th>Date Completed</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>10/29/07</td>
<td>no quiz</td>
</tr>
<tr>
<td>History and Ethical Principles - SBR</td>
<td>10/29/07</td>
<td>4/5 (80%)</td>
</tr>
<tr>
<td>Defining Research with Human Subjects - SBR</td>
<td>10/29/07</td>
<td>5/5 (100%)</td>
</tr>
<tr>
<td>The Regulations and The Social and Behavioral Sciences - SBR</td>
<td>10/29/07</td>
<td>8/8 (100%)</td>
</tr>
<tr>
<td>Assessing Risk in Social and Behavioral Sciences - SBR</td>
<td>10/29/07</td>
<td>5/5 (100%)</td>
</tr>
<tr>
<td>Informed Consent - SBR</td>
<td>10/29/07</td>
<td>5/5 (100%)</td>
</tr>
<tr>
<td>Privacy and Confidentiality - SBR</td>
<td>10/29/07</td>
<td>5/5 (100%)</td>
</tr>
<tr>
<td>Records-Based Research</td>
<td>10/29/07</td>
<td>2/2 (100%)</td>
</tr>
<tr>
<td>Research with Prisoners - SBR</td>
<td>10/29/07</td>
<td>5/5 (100%)</td>
</tr>
<tr>
<td>Research with Children - SBR</td>
<td>10/29/07</td>
<td>5/5 (100%)</td>
</tr>
<tr>
<td>Research in Public Elementary and Secondary Schools - SBR</td>
<td>11/03/07</td>
<td>5/5 (100%)</td>
</tr>
<tr>
<td>International Research - SBR</td>
<td>11/03/07</td>
<td>5/5 (100%)</td>
</tr>
<tr>
<td>Internet Research - SBR</td>
<td>11/03/07</td>
<td>4/4 (100%)</td>
</tr>
<tr>
<td>HIPAA and Human Subjects Research</td>
<td>11/03/07</td>
<td>2/2 (100%)</td>
</tr>
<tr>
<td>Conflicts of Interest in Research Involving Human Subjects</td>
<td>11/03/07</td>
<td>2/2 (100%)</td>
</tr>
<tr>
<td>Ohio State University</td>
<td>11/03/07</td>
<td>no quiz</td>
</tr>
</tbody>
</table>

For this Completion Report to be valid, the learner listed above must be affiliated with a CITI participating institution. Falsified information and unauthorized use of the CITI course site is unethical, and may be considered scientific misconduct by your institution.

Paul Braunschweiger Ph.D.
Professor, University of Miami
Director Office of Research Education
CITI Course Coordinator

https://www.citiprogram.org/dev/members/learners/crbystage.asp?strKeyID=... 7/9/2008

103
APPENDIX C

INSTITUTIONAL REVIEW BOARD EXEMPTION
**Title Page - Application for Exemption**

**From Review by the Institutional Review Board**

The Ohio State University, Columbus OH 43210

<table>
<thead>
<tr>
<th>Principal Investigator</th>
<th>Co-Investigator</th>
<th>Co-Investigator</th>
<th>Protocol Title</th>
<th>Source of Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name: Dr. James H. Sanders, III</td>
<td>Name: Emily D. Wise</td>
<td>Name:</td>
<td>Development Strategies for Historical House Museums</td>
<td>N/A</td>
</tr>
<tr>
<td>University Title:</td>
<td>University Status:</td>
<td>University Status:</td>
<td></td>
<td>For Office Use Only</td>
</tr>
<tr>
<td>□ Professor</td>
<td>□ Faculty</td>
<td>□ Faculty</td>
<td>□ Approved. Research has been determined to be exempt under these categories: □ Disapproved. The proposed research does not fall within the categories of exemption. Submit an application to the appropriate Institutional Review Board for review.</td>
<td></td>
</tr>
<tr>
<td>□ Associate Professor</td>
<td>□ Staff</td>
<td>□ Staff</td>
<td></td>
<td></td>
</tr>
<tr>
<td>□ Assistant Professor</td>
<td>□ Graduate Student</td>
<td>□ Graduate Student</td>
<td></td>
<td>Date of determination: 2/01/08</td>
</tr>
<tr>
<td>□ Instructor</td>
<td>□ Undergraduate Student</td>
<td>□ Undergraduate Student</td>
<td></td>
<td>Signature: Janet A. Schulte</td>
</tr>
<tr>
<td>□ Other: Please specify. (May require prior approval.)</td>
<td>□ Other: Please specify. (May require prior approval.)</td>
<td>□ Other: Please specify. (May require prior approval.)</td>
<td></td>
<td>Office of Responsible Research Practices</td>
</tr>
</tbody>
</table>

**Campus Address (room, building, street address):**

Dr. James H. Sanders, III  
Art Education - College of the Arts  
381 Hopkins Hall  
120 N. Oval Mall  
Columbus, OH 43210  
Signature: Date: Fax: 614-888-4483

Emily D. Wise  
Mailing Address:  
Columbus, OH 43204  
Signature: Date: Fax: 614-292-7289

<table>
<thead>
<tr>
<th>Protocol Title</th>
<th>Source of Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Development Strategies for Historical House Museums</td>
<td>N/A</td>
</tr>
</tbody>
</table>

**Research has been determined to be exempt under these categories:**

- [ ]

**Research may begin as of the date of determination listed below:**

- [ ]

**The proposed research does not fall within the categories of exemption. Submit an application to the appropriate Institutional Review Board for review.**

**Date of determination:** 2/01/08  
**Signature:** Janet A. Schulte  
Office of Responsible Research Practices
APPENDIX D

BUDGET OF COPPERFIELD HOUSE AND GARDENS, 2008-2009
**2008-2009 [Copperfield House and Gardens] Budget**

**Income**
- Restoration Income: $14,000.00
- Interest Income: $750.00
- Museum Shop Sales: $3,900.00
- [Annuity] Interest Income: $6,500.00
- Room Rental Income: $45,500.00
- [Copperfield] Tour Income: $8,000.00
- UGRR Tour Income: $8,250.00
- Educational Event Income: $6,000.00
- [Copperfield] Development Income: $17,000.00
- Interest- [Copperfield Granddaughter]: $4,700.00
- [Copperfield] Business Catering Income: $250.00
- Grant Income: $10,000.00
- Misc. Income: $300.00

**Total Income**: $125,150.00

**Expense**

**Program Expenses**
- Restoration Expenses: $2,250.00
- Museum Shop Expenses: $2,400.00
- Museum Expenses: $3,000.00
- Brochure Printing: $1,250.00
- [Newsletter] Printing: $1,100.00
- Educational Event Expense: $4,500.00
- Development Expense: $6,500.00
- Program PR Taxes: $2,375.00
- Program Salaries: $31,050.00
- Undesignated Conference Exp: $150.00
- Subscriptions & Memberships: $922.00
- Program Depreciation: $34,470.00
- Outreach Expense: $125.00
- Parking Lot Maintenance: $250.00
- UGRR Misc. Expense: $1,500.00
- UGRR Transportation Expense: $500.00
- Program Operations Expense
  - Program Postage Expense: $650.00

**Total Program Operations Expense**: $650.00

**Total Program Expenses**: $92,992.00
<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catering Expense</td>
<td>100.00</td>
</tr>
<tr>
<td>General Supplies</td>
<td>1,400.00</td>
</tr>
<tr>
<td>Office Supplies</td>
<td>500.00</td>
</tr>
<tr>
<td>Insurance Expense</td>
<td>6,358.00</td>
</tr>
<tr>
<td>Payroll taxes</td>
<td>2,062.00</td>
</tr>
<tr>
<td>Postage Expense</td>
<td>500.00</td>
</tr>
<tr>
<td>Staff Training Expense</td>
<td>200.00</td>
</tr>
<tr>
<td>Salaries</td>
<td>19,950.00</td>
</tr>
<tr>
<td>Salaries-Duty Manager</td>
<td>7,000.00</td>
</tr>
<tr>
<td>Telephone Expense</td>
<td>2,100.00</td>
</tr>
<tr>
<td>Advertising</td>
<td>9,946.00</td>
</tr>
<tr>
<td>Repair &amp; Maintenance Expense</td>
<td>5,000.00</td>
</tr>
<tr>
<td>Ground Maintenance</td>
<td>5,700.00</td>
</tr>
<tr>
<td>Service Contracts</td>
<td>8,723.00</td>
</tr>
<tr>
<td>Misc. Expense</td>
<td>100.00</td>
</tr>
<tr>
<td>Property Tax Assessment</td>
<td>1,100.00</td>
</tr>
<tr>
<td>Utilities Expense</td>
<td>12,134.00</td>
</tr>
<tr>
<td>Equipment Expense</td>
<td>480.00</td>
</tr>
<tr>
<td>Depreciation</td>
<td>14,724.00</td>
</tr>
<tr>
<td><strong>Total Support Expenses</strong></td>
<td><strong>98,077.00</strong></td>
</tr>
<tr>
<td><strong>Total Expense</strong></td>
<td><strong>191,069.00</strong></td>
</tr>
<tr>
<td><strong>Net Income</strong></td>
<td><strong>-65,919.00</strong></td>
</tr>
</tbody>
</table>
APPENDIX E

BASIC BUDGET OF KEY AUXIIARY, 2008-2009
## [Key Auxiliary] FY 2008-2009 Budget

### Income

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restoration Income</td>
<td>14,000.00</td>
</tr>
<tr>
<td>Interest Income</td>
<td>7,750.00</td>
</tr>
<tr>
<td>Dues</td>
<td>76,000.00</td>
</tr>
<tr>
<td>Unrestricted Donations</td>
<td>15,000.00</td>
</tr>
<tr>
<td>Room Rental Income</td>
<td>45,500.00</td>
</tr>
<tr>
<td>Community Project Income</td>
<td>50,000.00</td>
</tr>
<tr>
<td>KH Development Income</td>
<td>17,000.00</td>
</tr>
<tr>
<td>BB Income</td>
<td>42,000.00</td>
</tr>
<tr>
<td>HTOH Income</td>
<td>35,100.00</td>
</tr>
<tr>
<td>Grant Income</td>
<td>10,000.00</td>
</tr>
<tr>
<td>HP Income</td>
<td>26,500.00</td>
</tr>
<tr>
<td>Spring Gala Income</td>
<td>55,000.00</td>
</tr>
<tr>
<td>Other Income</td>
<td>63,350.00</td>
</tr>
</tbody>
</table>

**Total Income**  
457,200.00

### Expense

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Expenses</td>
<td></td>
</tr>
<tr>
<td>Museum Expenses</td>
<td>3,000.00</td>
</tr>
<tr>
<td>Website</td>
<td>8,000.00</td>
</tr>
<tr>
<td>Project Expense</td>
<td>70,500.00</td>
</tr>
<tr>
<td>Development Expense</td>
<td>6,500.00</td>
</tr>
<tr>
<td>Program Salaries</td>
<td>48,133.00</td>
</tr>
<tr>
<td>AJLI Dues</td>
<td>22,700.00</td>
</tr>
<tr>
<td>Bargain Box Expenses</td>
<td>22,450.00</td>
</tr>
<tr>
<td>HTOH Expense</td>
<td>7,010.00</td>
</tr>
<tr>
<td>Holiday Preview Expenses</td>
<td>4,000.00</td>
</tr>
<tr>
<td>Spring Gala Expenses</td>
<td>13,750.00</td>
</tr>
<tr>
<td>Other Program Expenses</td>
<td>102,410.00</td>
</tr>
</tbody>
</table>

**Total Program Expenses**  
308,453.00
# Support Expenses

<table>
<thead>
<tr>
<th>Expense</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audit/Fin Analysis Expense</td>
<td>17,000.00</td>
</tr>
<tr>
<td>Insurance Expense</td>
<td>11,309.00</td>
</tr>
<tr>
<td>Salaries</td>
<td>25,644.00</td>
</tr>
<tr>
<td>Repair &amp; Maintenance Expense</td>
<td>15,000.00</td>
</tr>
<tr>
<td>Utilities Expense</td>
<td>19,834.00</td>
</tr>
<tr>
<td>Depreciation</td>
<td>22,913.00</td>
</tr>
<tr>
<td>Other Support Expenses</td>
<td>64,111.25</td>
</tr>
<tr>
<td><strong>Total Support Expenses</strong></td>
<td><strong>175,811.25</strong></td>
</tr>
</tbody>
</table>

| Total Expense                | 484,264.25 |
| Net                          | -27,064.25 |

| Depreciation                 | 60,104.00  |
| Net Cash Flow                | 33,039.75  |
APPENDIX F

BUDGET OF THE PERRY MUSEUM, 2008-2009
# Perry Museum Budget

Approved, February 12th, 2008

## Receipts

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>City of [Huntington]</td>
<td>10,519.00</td>
</tr>
<tr>
<td>Interest and Dividends</td>
<td>900.00</td>
</tr>
<tr>
<td>Donations</td>
<td>4,000.00</td>
</tr>
<tr>
<td>Membership Dues</td>
<td>6,300.00</td>
</tr>
<tr>
<td>Events</td>
<td>2,000.00</td>
</tr>
<tr>
<td>Book Sales</td>
<td>3,000.00</td>
</tr>
<tr>
<td>Calendar – net</td>
<td>400.00</td>
</tr>
<tr>
<td>Endowment Fund</td>
<td>0</td>
</tr>
<tr>
<td>Emerson House</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$27,119.00</strong></td>
</tr>
</tbody>
</table>

[Emerson House]: Actual fundraising connected to [Emerson] to be determined

## Expenses

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Director</td>
<td>$14,500.00</td>
</tr>
<tr>
<td>Telephone</td>
<td>1,200.00</td>
</tr>
<tr>
<td>Books</td>
<td>1,800.00</td>
</tr>
<tr>
<td>Postage</td>
<td>700.00</td>
</tr>
<tr>
<td>Supplies</td>
<td>1,600.00</td>
</tr>
<tr>
<td>Insurance</td>
<td>3,200.00</td>
</tr>
<tr>
<td>Cleaning</td>
<td>800.00</td>
</tr>
<tr>
<td>Advertising</td>
<td>1500.00</td>
</tr>
<tr>
<td>Repair</td>
<td>493.00</td>
</tr>
<tr>
<td>Security System</td>
<td>450.00</td>
</tr>
<tr>
<td>Dues &amp; Conferences</td>
<td>350.00</td>
</tr>
<tr>
<td>[Private] Annuity</td>
<td>326.00</td>
</tr>
<tr>
<td>Other</td>
<td>200.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$27,119.00</strong></td>
</tr>
</tbody>
</table>

Non-budget receipts dedicated for [Emerson] preservation:

- Grant – [Private] Foundation $5,000
- Grant – Community Development Block Grant $35,000
- Grant – [Emerson] Cost-Share ([state]DHR) $5,000
LIST OF REFERENCES


City of Huntington (1997). *Copy of Action of City Council*.


115
Huntington Heritage Foundation (1993). *Articles of Incorporation.*


