

**Delaware County Public History Feasibility Study and Implementation Plan
February 2011**



Heritage
Consulting, Inc.

Delaware County Public History Feasibility Study and Implementation Plan

for the

Delaware County Planning Department



A report

By

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Message from the Delaware County Planning Department

It is with great pleasure that Delaware County Planning Department offer this report, which highlights a year-long, incredibly ambitious Public History Project for Delaware County. From beginning to end, the project has had many unforeseen successes.

First of all, it is remarkable that the State Department of Community and Economic Development (DCED) had the foresight to see the connection between community economic development and public history. In awarding a grant to us for the Public History Feasibility Study and Implementation Plan, DCED acknowledged the vital connection between public history and revitalizing our communities.

Secondly, this Project's intent was to collect data as to the successes and challenges of the varied entities whose missions are to promote our shared county heritage. It was assumed that many of the organizations would participate, but we never envisioned the extent of participation or enthusiasm of the varied countywide, municipally-scaled, or site specific historic sites. Over 80% of the historical organizations contacted participated in the surveying activities, and even more attended the public meetings held periodically throughout the year. (Normally, a 33% response rate is the expected response in studies).

Lastly, what emerged was a strong message; there is a tremendous amount of dedicated people in this county, mostly volunteers, who work hard to share with the public the many historical narratives of Delaware County. Despite the joint successes achieved in every corner of the county, witnessed in the many historic buildings overseen, programs offered, and schoolchildren reached, the need for more technical information and organizational management skills of non-profits is greater than ever in order to keep these amazing places and groups vital. A common thread running throughout the year was the desire for more cooperation amongst the historical organizations, to build on each other's strengths and share the search for answers to common challenges.

We at the Planning Department want to offer big thanks to Heritage Consulting Inc. for the immense task of collecting so much useful data, as well as devising from all the information collected an Implementation Plan that will serve well the many countywide, municipal-based, and individual historical groups.

We want to acknowledge efforts of the Project managers, Beverlee Barnes and Jill Hall, who worked diligently with the consultant throughout the entire Project to ensure the Project's success. We also want to acknowledge other staff members who were instrumental in the success of the Project, including Alan Higgins and Rachelle Green of the Preservation Section for their valuable feedback throughout the process, and Anne Wolfe, the copy editor, for her expertise and effort in finalizing the final product. We also want to acknowledge the grantors, DCED, Department of Housing and Urban Development, and County Council for supporting our request for funding. Most of all we want to thank the many individuals who participated in the study and meetings. It is really because of all of you involved in public history in the county that we can move forward with a clear understanding of the strengths and challenges we now face with a more informed perspective.

Executive Summary

Delaware County has many wonderful historic sites and organizations dedicated to the history of the county operating throughout the region. These vary from groups whose focus is countywide like the Delaware County Historical Society, to groups operating on a municipal-scale like historical commissions, Historical Architectural Review Boards (HARBs), historical societies, and to historic sites that keep alive the story of one family, individual or building.

Even though all these groups strive to achieve their varying missions ranging from promoting historical research to historic preservation, many of the organizations, especially municipal scaled or smaller site-specific organizations, need some improvements or guidance. Many of these organizations share common problems but do not have the expertise or funds to fix them.

The purpose of the Delaware County Public History Feasibility Study and Implementation Plan is to improve the effectiveness and impact of the more than 80 historical organizations throughout the county. The goals of the year-long project are:

- Determine how best to remedy the underutilized nature of historic organizations throughout the county;
- Address how the historical organizations can better cooperate and coordinate efforts to present a more inclusive interpretation of our history that reflects all periods, peoples, and geographic portions of the county;
- Better preserve our irreplaceable public history resources;
- Make history available to the public as an educational tool with better efficiency and success;
- Help foster revitalization.

Heritage Consulting Inc. surveyed 80 historical organizations in Delaware County as part of the Delaware County Public History Feasibility Study and Implementation Plan in fall 2009. Rather than focus on the more developed organizations that have sophisticated funding streams and staffing to implement activities, the Feasibility Study and Implementation Plan are targeted more towards volunteer-managed and dependent organizations.

Feasibility Study

Participation in the Study employed a variety of forms that built upon one another as the project progressed. Participation began with a survey of the historical organizations. Sixty-one historical organizations participated in the surveys, a remarkable 80% response rate and indicative of the enthusiasm for public history in Delaware County. In addition, the consultants conducted 40 one-on-one interviews with a variety of historical organizations including: Historic Architectural Review Boards, historical commissions, preservation organizations, historic sites, and historical societies. The purpose of the interviews was to complete the survey instrument and gain more background information and depth about organizational capacity of the historical organizations within the county. Following the surveys and interviews, seven focus groups were held with 40 individuals, representing all the varying sites with similar types of sites grouped together. The focus groups helped amplify and give further detail about

many issues already identified from the 61 surveys and 40 interviews conducted in fall 2009. The seven focus groups provided an excellent overview of the differing needs and opportunities ahead for both the staffed and volunteer-run organizations.

SWOT (Strengths, Weaknesses, Opportunities, Threats) Analysis based on Surveys, Interviews, and Focus Groups

Most significant strengths

Forty-nine organizations that identified themselves as historic sites, historical societies, or preservation organizations responded to the survey. Of those 49 organizations that responded, 31 operate or control an historic site. These sites are located throughout the county, and many sites have more than one building at their locations. All told, there are more than 138 historic buildings in the care of the historical organizations in Delaware County. The buildings are mainly homes of Quaker settlers and include ancillary structures such as barns, summer kitchens, ice houses, and workshops. Seventy-seven percent of the sites report that the sites themselves are well maintained, and this was confirmed by site visits.

Delaware County historical organizations are better off financially than many of their peers in the region. Unlike what the consultants have found in other areas in this region, 18 of the 49 organizations surveyed had formal endowments or tens of thousands of dollars in working capital.

Of the 31 sites, 24 are unstaffed and 11 have at least one full or part-time staff. Seven of the eleven staffed sites had endowments or board-designated funds that function as endowments. Prudent management over the years at 11 of the volunteer-run sites has allowed them to create investment accounts of \$10,000 to more than \$150,000. Organizations with investment earnings are better prepared for the future. These sums allow the organization a myriad of options for how it manages its site, when to make repairs, or undertake restoration projects. A 2002 study of the IRS 990 tax returns of the 275 historic sites in Philadelphia and the surrounding four counties indicated that less than 33% of these organizations had endowments of any size.¹



Newlin Grist Mill, Staffed Site

Seventy-nine percent of all Delaware County historical organizations are managed solely by volunteers. This is a high percentage and is both a weakness and a strength. For example, many of the historical organizations are small, but this may be a strength because they are not saddled with staff salaries and expensive overhead costs that require constant fundraising. Due to their small sizes, the organizations are potentially nimble and could respond to opportunities when presented.

¹ Donna Ann Harris, *New Solutions for House Museums: Ensuring the Long-Term Preservation of America's Historic Houses*, Lanham MD: AltaMira Press, 2007, 11.

There is high interest in collaboration among historical organizations based on surveys and interviews, and this is a great strength from which to work for future endeavors. The historical organizations are eager to learn from each other and from outside experts and are open to new opportunities for shared activities, tours, and programming. Competition with other sites in Delaware County did not appear to be an issue except around dates for fundraising and programming events. Making the existing informal relationships between the historical organizations into formal joint programs should be encouraged. This could benefit the sites that wish to cooperate.

Most significant weaknesses

The local historical societies are the most fragile organizations reviewed. Only four of the eleven historical societies have sufficient locations to store their tangible pieces of the past, their collections, and many resort to keeping their objects and archives in Board Members' attics and basements. These collections are held in the public trust and need to be available to researchers.

All of the local historical societies surveyed have some type of collection:

- Manuscripts,
- Books,
- Maps,
- Archives, or
- Objects.

These collections are not catalogued or accessioned, so many of these organizations do not know what they own and therefore do not know how these objects should be stored to mitigate current or future damage. These objects were given by donors with the intent that they would be maintained or used by the public. The public cannot use or enjoy these collections because they are stored in many locations not open to the public.

The lack of appropriate locations for storage or use of these collections is perhaps the greatest weakness revealed by the entire survey and interview effort. It does not appear that the collections entrusted to historical societies without places to house them are being appropriately managed by their well-meaning stewards. Historical societies associated with municipalities must make their storage needs known to their local elected officials.

There are more than 80 historical organizations in Delaware County, and more are being started each year. One quarter of the organizations surveyed started in the last 10 years alone, and about nine organizations hope to incorporate and obtain tax exempt status so that they can begin raising money to restore their sites, create preservation organizations, or start historical societies. The organizers of new historical organizations are all well intentioned individuals who feel that a new entity is critical to their efforts.

All of these emerging organizations need assistance. There is particular concern about those who wish to save historic sites because they are continuing the time-tested method of saving historic buildings by buying them or leasing them in order to save them from deterioration or destruction. These newly emerging organizations must be educated to understand the uncertain road ahead in setting aside these structures as museums based on the experiences of their peers. Other alternatives to museum use are recommended for these sites to consider because of the great concentration of small and struggling historic sites that already exist within the county.

Past generations of historical organizations in Delaware County have saved many of the oldest homes in the county and opened them as historic sites. By and large, these sites tell the same story because they are homes of pre-Revolutionary War Quaker settlers. While each house is indeed unique, these sites have done little to differentiate themselves. If joint programming between these sites is a desired result, then a review is necessary of all of these sites to parse out how interpretation can be better coordinated so that the stories being told can reflect broader themes and engage new audiences. More information can be found in the Interpretation Chapter of this report, page 65.



Although the historic sites seem well maintained, all of the 31 historic site organizations identified have deferred maintenance concerns. Less than half (45%) of these organizations had cost estimates for work they are contemplating, but the remaining half had not yet obtained cost estimates for needed work. While the sums needed to restore these buildings were more than \$22 million dollars, which includes two projects over \$10 million dollars each, there is more concern regarding the sites that have yet to obtain costs for their repair and restoration needs.

The local municipalities own many of these sites, so it is unclear how restoration projects would proceed or be funded. Volunteer-run organizations that manage historic sites they do not own, and lack endowments, will almost certainly not have the capacity to raise funds to make these expensive repairs, so it will fall to the municipality to undertake work. Otherwise, deterioration will continue. These sites will need assistance to identify reputable contractors to provide cost estimates to the municipalities, and then the organizations must advocate for scarce public dollars for restoration.

Forty-eight percent of the organizations surveyed do not have formal budgets. The lack of budgets indicates that their revenues fall below the threshold of \$25,000 when a tax return would need to be filed with the Internal Revenue Service. Although these small budgets were noted earlier in the Strengths Section because they allow these organizations to be nimble and respond to opportunities, these small budgets are also weaknesses because the organizations have limited capacities to undertake the work that their missions dictate.

Despite the fact that there are 80 historical organizations in Delaware County, there is no clear individual leader or organization that can drive the variety of changes needed on behalf of the history community.

The Delaware County Heritage Commission was suggested as another logical group to take this role as well as the County Planning Office. In discussions with both of these entities it became clear that both have narrow administrative charges or missions, and these entities are unable to take on this leadership role.

Several individuals identified the Delaware County Historical Society as a leader. The Delaware County Historical Society maintains two large historic buildings, which include a research facility/library. The Society operates the library, runs a highly successful educational program called Passport to History, and offers occasional tours and seminars that help advance their mission with a very small staff and volunteer corps, and thus have limited capacity at this time to take on the wide span of needed additional projects.

Even though many of the changes needed fit within the missions of the various countywide organizations, all that is needed does not fit entirely into any one existing organizations mission or expertise. Each countywide entity is able to achieve their different missions but with limited staff, no one entity can achieve the diverse variety of needed improvements.

The interviews also revealed at least five attempts in the past to develop a leadership structure for coordinating the historical organizations in the county. Some of these attempts failed outright; others worked for several years but eventually failed due to lack of interest or power struggles. Overcoming so many failed attempts is indeed daunting. Based on the superb attendance at the Kick Off Meeting, the great enthusiasm shown to the survey, and general interest in collaboration, the time is ripe to try again. The Implementation Plan, which is the second half of this project (see recommendations page 89), will suggest a consortium model of leadership that might be used to provide the organizational infrastructure to any cooperative or collaborative effort for the Delaware County historical organizations.

Most significant opportunities

A great number of the weaknesses noted above can be mitigated through an aggressive effort to provide training and technical assistance to the historical organizations over time. The fact that more than 40 organizations rated that they wanted more training and technical assistance is an opportunity. The creation in December 2009 of the Delaware County History and Preservation Network List Serv can help to spread the word when training opportunities are available in the region.

Survey respondents noted that additional group training was desired in the following categories:

- Volunteer Recruitment,
- Fundraising,
- Marketing and advertising, and
- Collections management.

Volunteer recruitment, specifically reaching out to new age groups, was the most sought after training. While collections management was low on the list, it should have had higher urgency given the space needs, collections management, and storage of the majority of historical societies.

Training would help to build the organizational capacities of these nonprofit organizations. A commitment to ongoing training and coaching would be necessary on the part of the organization's board to raise its profile in the community and engage a broader audience. It is uncertain how many organizations would wish to make a concerted effort to engage in on-going training.

Another opportunity to strengthen public history in Delaware County is to provide training for historical organizations with regards to school programming. While so many historic sites have a desire to work with local schools, only 32% do currently. The Pennsylvania Standards for History are the baseline curriculum standards that any local school district must teach according to state law. More than 70% of the volunteer-run historic sites are unaware of these standards and do not have educational programs that meet these standards.² Training organizations to tailor to these standards and to outreach to the schools would help increase school visitation to sites and increase awareness about the sites. More information can be found in the Inclusion of School Programs Chapter of the report, page 60.

Staffed organizations are clearly the engine that attracts the vast majority of visitors to Delaware County. Though in the minority of Delaware County historical organizations, these 11 staffed organizations should be promoted and supported because they have the organizational infrastructure to raise funds, maintain buildings, and promote their sites and organizations. They offer quality visitor experiences and programming. The volunteer-run sites could be linked thematically to these tourist engines so that they could capture some spillover visitation if new tours and themes were developed with cooperation from the staffed sites. To gain more hours that volunteer-run sites are open to the public, emphasis should be placed on shared tours or joint history projects so that more sites will be open regular hours or both Saturday and Sunday during the good weather season.

Final thoughts

Delaware County has some superb historic sites and organizations sprinkled throughout the county that deserve to be better known, not only by the residents, but by the region as a whole. The consultants were impressed with the energy and enthusiasm seen for the data-gathering phase of the Study. The Implementation Plan phase of this work will develop ideas for ways to tie together these sites and expand the interpretive story line for the county. The interest in cooperating and collaborating is a very positive sign. The historical organizations will be best served if collaborative programming occurs to forge a bold future for Delaware County.

Recommendations

The information from all of the surveys, interviews, and focus groups were used to help craft the following recommendations and realistic Implementation Plan for Delaware County historical organizations. The issues surrounding interpretation and working with the schools is expanded in individual chapters, which include possible ways to address the issues.

² There is a chapter on the challenges of utilizing local historical resources in local school curricula.

The Delaware County Public History Feasibility Study and Implementation Plan includes a list of recommendations that address the needs and desires of the historical organizations identified during the surveys, interviews, and focus groups and are comprised of the following topics;

- Information Sharing between historical organizations
- Collaboration
- Technical Assistance
- Collections Management
- Interpretation Update
- School Tours
- Tourism
- Capital Repair
- Implementation

These recommendations focus more on the volunteer-managed and dependent organizations rather than the organizations with more resources.

Throughout the Feasibility Study, it became clear that the most effective means of achieving all of the identified recommendations would be the creation of a new consortium organization comprised of the representatives from the various historical organizations. This chapter includes an Action Plan that describes how this consortium addresses all the specific needs. In addition, it outlines the consortium's development as an entity through subsequent years and how the consortium could implement the project-specific recommendations in the short-term (one –to two years), mid-term (three to five years) and long-term (five to ten years).

The Action Plan (page 87) emphasizes early implementation and short-term tasks to occur within the next two years. There are early tasks for the Delaware County Planning Department staff including fostering the creation of this new consortium, called the Delaware County Historic and Preservation Network. Even though this consortium appears to be an effective tool to address the needs, the project specific recommendations could also be implemented by individuals or groups of individuals to better strengthen their organizations.

Action Plan

Early action items

Beyond the scope of the original project, a Project Steering Committee was appointed to vet ideas and offer advice at critical portions of the year-long project. Public meetings throughout the project were also incorporated beyond the original scope to inform the historical organizations in the county about the project's progress. All of these meetings included a training component for the volunteer managed historical organizations. Topics included volunteer recruitment and fundraising. A list serve, called the Delaware County Historic and Preservation Network, was set up by one local historical society to foster communication between the history advocates. This Network has a website (www.dchpn.org), which includes a directory of all 80 historical organizations and a shared calendar to promote individual events of the member organizations.

Short-term recommendations 1-2 years

The interviews and focus groups conducted in the early part of the project identified the need for a coordinating entity for the 80 historical organizations. Most of the short-term projects revolve around the expansion of the Delaware County Historic and Preservation Network into a viable consortium of organization that is able to implement projects identified in the recommendations. The Recommendation chapter (page 81) explains how the DCHPN could be organized and provides advice on Board and Project Team membership, budget development, communications, and initial projects.

Other short-term recommendations articulate a variety of tasks for the Delaware County Planning staff members to help and support the development of the coordinating entity and the organizational development of the historical organizations in the county. These projects include posting more information about public history on the website, publishing articles, promoting the already completed maintenance guide, and consolidating lists of contractors and speakers and making the lists widely available to the historical organizations.

A series of topical meetings or training workshops that the Planning Department can host to further public history in general and the efforts of the DCHPN is also identified. Meetings are needed with the staffed historic sites to explain their potential roles in the development of the DCHPN projects. Other meetings are needed to explain and promote the issues described in the chapter of this report on expanding school tour visitation to historic sites (page 60) in Delaware County. A similar meeting is needed with the volunteer managed historic sites to assist them in understanding how to upgrade interpretation at their sites. Collaboration between the Historic Architectural Review Boards and Historical Commissions and other organization could be the subject of another topical meeting. Finally it would be beneficial if the County Planning Staff would host a meeting between municipalities and their historical societies to articulate the needs for safe and environmentally adequate space to store collections, which are being and stored by society board members in their attics and basements. The County Planning staff should host coordinating meetings between sites and elected and appointed officials to advance public history in the county.

An implementation task calendar organized by month for the first two years is provided as part of the Recommendation chapter.

Mid-term recommendations 3-5 years

The mid-term recommendations consist of specific project ideas culled from the surveys, interviews, and focus group reports. Project teams, consisting of volunteers from various historical organizations who are most interested in specific topics, should be created to implement these activities. Most of the projects require grant funding in order to be implemented. Projects serving multiple historical organizations are more likely to receive such grants. Volunteers interested in pursuing projects need to identify likely funding sources. Each project description includes a list of likely funders based on the foundation/agencies giving interests.

Collaborative projects including development of theme tours as noted in the Interpretation chapter of this report (page 65) will broaden the presentation of the rich 400 year history of Delaware County.

There are millions of dollars of building restoration and planning studies needed, and DCHPN should encourage the use of Community Development Block Grants for renovation work. Another project is to consider advocating for Delaware County Council to invest matching grant funds over five years to restore these historic sites.

Building on meetings and training programs held in the previous years, internships could be developed with local college students in the education department or retired teachers to help volunteer managed sites to upgrade their lesson plans and attract more school field trips to their sites. Historical societies and historic sites were interested in having access to lists of consultants and speakers on local history topics and crafts.

Finally the DCHPN at three years old would need to articulate its future and boost its organizational development through training or technical assistance projects.

Long-term recommendations 5-10 years

The development of the DCHPN organization as a viable nonprofit entity with the ability to apply for grant funds without seeking partners as applicants is important for to the success of many of the long-term recommendations. Joint projects between the historical organizations would be encouraged including demonstration or pilot projects. As a county wide advocacy organization, the DCHPN can be a forceful advocate for local historical societies to identify storage needs of their collections by hosting educational workshops, mentoring programs with other historic sites, and assisting these organizations to inventory, catalogue, and store their collections in appropriate facilities and boxes.

The DCHPN can also foster collaborative programs through mentoring between the staffed and volunteer sites or between the volunteer sites themselves. Theme tour programs are an especially ripe area for exploration as explained in the Interpretation chapter (page 79). Better quality interpretation is necessary at many of the volunteer sites, and jointly funded applications are needed to support technical assistance to these sites. Other joint projects include the creation of a Delaware County Heritage Weekend, designed to showcase many of the sites and organizations across the county that would be open and promoted widely (for a description of the Delaware County Heritage Weekend, see the Recommendation Chapter page 115). This would be an ideal project to partner with countywide entities, like the Delaware County Historical Society and the Brandywine Conference and Visitor's Bureau.

Conclusion

There are many exciting projects contained in this Implementation Plan. Committed volunteers and organizations are crucial to moving public history forward in Delaware County. The Delaware County

Historic and Preservation Network can be an effective coordination entity, building on the success and public response of the list serve and website (www.dchpn.org). Patience and careful planning will be required to ensure the success of the many exciting new initiatives.

Introduction

“Public history” is the use of historical knowledge and artifacts by the general public. Public history includes many activities: museum exhibits, historic preservation projects, books, collections, speakers, presentations, festivals, and many other activities. Public history engages a community’s shared past in a conversation about the future.³

Purpose

The purpose of the Delaware County Public History Feasibility Study and Implementation Plan is to improve the effectiveness and impact of the more than 80 historical organizations throughout the county.

The goals of the year-long project are:

- Determine how best to remedy the underutilized nature of historic organizations throughout the county;
- Address how the historical organizations can better cooperate and coordinate efforts to present a more inclusive interpretation of our history that reflects all periods, peoples, and geographic portions of the county;
- Better preserve our irreplaceable public history resources;
- Make history available to the public as an educational tool with better efficiency and success; and
- Help foster revitalization.

In order to achieve these goals of the purpose, the Project identified six objectives:

1. Assist communities in strengthening their local historical groups’ and sites’ abilities to communicate their heritage to the public,
2. Promote scholarly research to re-frame the county’s diverse history into a more inclusive interpretation that reflects all periods, peoples, and geographic portions of its past,
3. Actively seek grants and other types of funding to develop new scholarship, programming, exhibits, educational models, and digitally based mediums, while continuing historic preservation efforts and general upkeep of historical societies and sites,
4. Work with the Delaware County Intermediate Unit (DCIU) and Delaware County Historical Society (DCHS) to integrate local history into elementary and secondary school curriculums, which will emphasize themes, people, places, and events in compliance with the Pennsylvania Academic Standards for History,
5. Develop partnerships with other cultural and commercial entities to present history in conventional and unconventional spaces, and
6. Partner with the Brandywine Conference and Visitor’s Bureau to establish a more organized method of presenting the county’s history as an economic draw for heritage tourism.

³ This definition is adapted from http://www.publichistory.org/what_is/definition.html

Existing conditions

Delaware County has a diverse population of 80 historical organizations that include groups with a countywide focus to municipal-scale groups, which include municipal created historical commissions, and HARBs, local municipal historical societies, and historic sites that focus on one particular building or location. All of these organizations have different missions but work to promote public history and its associated activities within the county.

There are four countywide organizations, which each play a unique role in promoting public history in Delaware County and all four participated in this Project. These included the Heritage Commission of Delaware County, the Brandywine Conference and Visitor's Bureau, the Delaware County Planning Department, and the Delaware County Historical Society.

The Heritage Commission of Delaware County is an 11-member body appointed by the Delaware County Council. "The Heritage Commission's mission is to oversee the rich heritage of Delaware County and to support those organizations within the county's that are promoting and preserving our cultural legacy. Commission members accomplish this mission through outreach within the historic communities of Delaware County, as well as providing a resource base for these organizations and individuals."⁴ The



2010 Leedom B. Morrison Heritage Commission Award

Heritage commission presents annual awards to projects that advance the heritage of Delaware County. Each year they present a seminar on a particular topic of interest to the historical organizations in the county. They have successfully played an advisory role to County Council in supporting many historic preservation projects all over the county.

The Brandywine Conference and Visitor's Bureau (BCVB) is the County's designated tourist promotion agency that promotes corporate meetings, group tours, and day trips to the many places to visit in Delaware County. The organization also maintains a tourism website www.brandywinecvb.org. The organization promotes historic sites through their magazine and website and supports heritage tourism efforts.

The Delaware County Planning Department is the major planning agency for the county. "The mission of Delaware County Planning Department (DCPD) is to promote the sound development and redevelopment of the county through the application of contemporary planning principles and smart growth concepts, while maintaining and enhancing the cultural, economic, and environmental livability of the County."⁵ The Historic Preservation division of the department develops historic preservation strategies for county historic, cultural, and archeological resources. The division works to utilize these

⁴ <http://www.co.delaware.pa.us/planning/historicpreservation/heritagecomm.html>

⁵ <http://www.co.delaware.pa.us/planning/sidebarpages/aboutus.html>

resources to enhance the livability and vitality of Delaware County communities. They provide technical assistance to municipalities in identifying and protecting their historical resources.



Delaware County Historical Society,
Library, Chester City

The Delaware County Historical Society is the countywide historical society. The mission of the Delaware County Historical Society is “to acquire, preserve and make available documentation of Delaware County history; to provide and support educational programs on the history of Delaware County; and to publish materials relevant to this history.”⁶ It maintains and operates a historical farm, research library and museum dedicated to the history of Delaware County. The society also conceived and administers a highly successful extensive school enrichment program for Delaware County students known as “Passport to

History.” The organization offers ongoing lectures on variety of topics of interest to historical organizations and has coordinated tours of historic sites throughout the county. It plays a unique role in overseeing county historical documents and offers a centralized source of research. The museum has rotating exhibits and provides an opportunity to showcase the many stories in Delaware County’s history.

The four countywide organizations each have different functions and missions, yet together they have the potential to engage the public history community. Public history in Delaware County is therefore highly decentralized among the 80 historical organizations.

Along with the four countywide organizations, there are several larger organizations that employ staff. These organizations have a great impact on public history in Delaware County because they are able to reach a large audience. These organizations provide many services, including working closely with the school system, presenting events that attract crowds of thousands, and highly researched programming,

Overview of report

This report is divided into a series of sections, and each section addresses a specific topic or phase of the project.

The *Methodology* section discusses the survey tools, research design, and procedures for the Feasibility Study and Implementation Plan.

The *Revitalization* section analyzes and discusses the specific links and relationships between public history and community and neighborhood revitalization. This section discusses the hard and soft economic impacts of revitalization, especially tourism. The section discusses how public history affects the quality of life in Delaware County communities.

⁶ <http://delawarecountyhistoricalsociety-pa.org/AboutDCHS.html>

The *Survey and Interview* section analyzes and presents the results of the online and paper surveys, site visits, and interviews of the public history project. Important findings and issues are highlighted in the form of statements backed by statistics from the surveys and interviews.

The *Focus Group* report contains findings from seven focus groups. Forty people involved in local historical organizations participated in the focus groups.

The *School Programs* section identifies and discusses specific challenges associated increasing the use of historic sites by local schools for class trips and other educational programming. This section contains specific recommendations to improve the integration of local history resources into school curricula.

The *Interpretation* section identifies new opportunities for public history interpretation and specific ways that organizations can engage new audiences by highlighting recent trends and changes in audience preferences. The section considers the existing interpretive activities in the county and discusses the means to broaden the historical narrative told at historic sites and organizations in the county by creating theme tours.

The *Recommendations* section identifies specific recommendations, divided into nine categories, to addresses the needs identified in the Feasibility Study. The Recommendations section also includes an Action Plan that is divided into early action (activities occurring during the Project period), short-term (1-2 years), mid-term (3-5 years), and long-term (5-10 year) projects, all designed to improve the effectiveness and impact of public history and its associated activities within the county.

The *Appendix* includes supporting materials for the public history project including survey tools, presentations, recommendation matrixes, sample theme tours, funding analysis, and other relevant materials to support the body of the report.

Feasibility Study

Methodology

The Delaware County Public History Feasibility Study and Implementation Plan was organized in two parts. Research was undertaken during the Feasibility Study to learn about the needs and organizational capacities of the 80 historical organizations in the county in order to create recommendations that appear in the Implementation Plan.

As defined, a feasibility study is an evaluation of a proposed activity or set of activities. Feasibility determines the relative difficulty and the likelihood of success of a specific project. This differs from a traditional research study that asks a single question to determine the existence or inexistence of a specific fact, effect, relationship, or activity. In considering the proposed difficulty and likelihood of success, the associated Implementation Plan presents concrete actions with the highest chances of success.

- The first phase and feasibility portion of the public history project included organizational surveys, site visits and interviews, and focus groups. The second phase of the project emphasized analysis, research, and concrete recommendations.

Participants

During the first phase, the list of 80 historical organizations provided by the Delaware County Planning Department was organized and checked.

The mailing list from the Delaware County Planning Department contained:

- 14 Historical Commissions,
- 5 Historic Architectural Review Boards,
- 1 Preservation Organization, and
- 60 Historic Sites and Historical Societies.

Historical Commissions are made up of local historians and activists that are appointed by local elected officials to advise the officials and residents on historic preservation matters. More than half (56%) of the Historical Commissions in Delaware County play some role in administering, reviewing, and making recommendations for an ordinance that affects demolition or alteration to historic resources.

Historical Architectural Review Boards (HARB) are made up of municipally appointed individuals to review and make recommendations to elected officials on changes within a district, which is created through the state enabling legislation Act 167, Local Historic District Act. The five municipalities in Delaware County with HARBS are Ridley Park, Radnor, Chadds Ford, Lansdowne, and Media.

One borough has a task force dedicated to preservation. The remaining 60 organizations include both historic sites and historical societies. These organizations have many purposes including one or more of the following: owning sites, managing municipally owned historic buildings, collecting materials, and educating the public about their local heritage. Approximately 31 of those organizations are historic sites that operate as museums; many of which are owned and/or operated by the local historical society. For the survey portion of the project, each organization (the population) received a physical survey, digital/internet (on-line) version, and one or more phone calls seeking participation in the survey.⁷



Historic Grange Estate, Haverford

Heritage Consulting Inc. arranged site visits and interviews with 40 organizations that were available to complete the survey instrument and gain more background information and depth about organizational capacity of the historical organizations within the county. Personal and on-site interviews with organizational representatives in all five different types of historical organizations in every portion of the county were conducted.

Focus group invitations were made to every group on the master list of 80 historical organizations. The focus groups were organized as small group meetings of eight to 10 people of similar backgrounds or interests. Between 11 and 16 people were invited to each focus group with the hope that approximately half would attend each meeting. A total of 40 people attended the seven focus groups. All stakeholders were informed that none of their comments would be directly ascribed to them in order to promote candid participation. Participants were also informed that their names would be included in a list of attendees in this report.

Participation in the Study was limited only by the availability of historic sites and organizations to complete the survey, arrange a site visit and interview, and participate in a focus group.

All four countywide organizations participated in the Study and were interviewed at great length to learn of their strengths and note where they could take advantage of future funding.

Research conducted about School Districts in Delaware County

Part of the research for the Delaware County Public History Feasibility Study and Implementation Plan, included “interviews with selected school districts and the Delaware County Intermediate Unit to gather information on curriculum opportunities for use of outside resources within the county, policies on classroom travel, and teacher involvement within the community. “

A diverse group of five professionals involved with public education and history in Delaware County were interviewed about the issues around the declining number of school visits to historic sites. The list

⁷ Web survey tool was available at [surveymonkey.com](https://www.surveymonkey.com)

of interviewees is included in the Inclusion of Local Historic Resources in Local School Curriculum Chapter (page 60).

Although the intention had been to contact every social studies curriculum coordinator, research and interviews showed that only the Marple Newtown School District has a full-time social studies coordinator. All the other fourteen school districts do not have specific curriculum specialists assigned to history or social studies.

Procedure and Measurement

The measures and metrics of the Study used a multi-method approach to gather data from respondents. This approach gathered both quantitative and qualitative data and allowed a full and extensive analysis of these 80 historical organizations. The survey and measurement methods took the five goals of the Study and translated them into areas of measurement and evaluation.

The survey portion was the most extensive. Specific surveys were designed for each of the three major types of organizations identified in the project:

- Historic Architectural Review Boards,
- Historical Commissions, and
- Historical Sites and Organizations.

These surveys used both closed- and open-ended questions to gather data. Data from these surveys were then compiled and analyzed using database software. Copies of all the surveys and cover letters are available in the appendix.

All focus groups used a guided format of questions to gather the same information from participants. Participants were grouped by organization type:

- Staffed sites,
- Historical commissions And HARBS and
- Volunteer-managed sites.

Comments from each focus group were transcribed and analyzed qualitatively.

Donna Ann Harris of Heritage Consulting Inc. facilitated all of the discussions using a written script. The same questions were asked of each group. Alexander Balloon, staff of Heritage Consulting, Jackie Wiese and Melissa Steeley, both interns, took contemporaneous typed notes of each focus group. The focus groups began at either 4:30 PM or 7:30 PM to assure that volunteers could attend the bulk of the sessions. If volunteers could not attend the sessions they were assigned, they attended other sessions that were more convenient. All of the focus group sessions were held in the conference room of the Delaware County Office of Housing and Community Development in Media, PA. Each focus group lasted an hour and a half to two hours.

Site visits and interviews followed-up on the survey questionnaire that was sent to all 80 historical organizations. Heritage Consulting asked follow-up questions about significant data and findings

revealed in the surveys. Additionally, researchers took observational notes about the site, programming, and organizational materials. These notes were compiled and analyzed using database software.

The data from each source (survey, focus group, interviews) were compiled and analyzed. Three reports were completed from this data. The Survey and Interview Highlights and Analysis chapter includes major findings and results and is included in this final report as a chapter. The Focus Group Results and Analysis chapter includes findings and is also included in this final report as a chapter. A focus group report was also produced, which contains all participant comments, and is available at Delaware County Planning Department.

Research, Analysis, and Recommendations

The first phase of the project including the surveys, site visits and interviews, and focus groups established the existing conditions and activities within the county. The baseline data and assessment allowed for an analysis of what activities and projects were feasible for the Implementation Plan. In order to achieve these activities, more analysis of what financial, social, and political resources were available to bring these projects and activities to fruition was conducted.

The Implementation Plan puts these activities into an action-oriented context. It identifies specific projects, associated challenges, and possible ways to overcome these challenges. As an Implementation Plan, it serves as a guide and timeline for specific projects and future activities.

The Role of Public History in the Revitalization of Delaware County Communities

Revitalization is an important goal of the Delaware County Public History Feasibility Study and Implementation Plan. Revitalization is a complex area of interest with many subtopics. One of the main goals of revitalization is to increase the economic, civic, and physical vitality of communities. The 80 historical organizations in Delaware County that were surveyed are currently working to promote public history as a valuable part of their communities.

Public history contributes both “hard” and “soft” benefits to Delaware County. The “hard” metrics of public history include economic activity, tourism, employment, and building rehabilitation expenses.

The “soft” metrics include quality of life, sense of community, and social capital. While these “soft” impacts are harder to measure, they have demonstrable impacts on important community elements including homeownership rates, housing value, and economic activity.

This chapter will detail both the “hard” and “soft” benefits of public history and highlight how public history can be valuable to each one of the 49 municipalities that make up Delaware County.

Soft Benefit: Public History and Historic Preservation in Quality Communities

Public history contributes greatly to the “Five Senses of Quality Communities,” a concept championed by Donovan Rypkema, an internationally known thinker about the economics of historic buildings and neighborhoods.⁸ These five senses contribute heavily to the economic, physical, and social value of historic communities throughout the United States, and they have importance for revitalization work here in Delaware County.

These five senses are:

- Sense of place
- Sense of identity
- Sense of evolution
- Sense of community
- Sense of ownership

Sense of Place

Public history and historic preservation contribute greatly to an individual community’s “sense of place.” Historic resources define the visual character of a community and separate a specific community from being just “any place.” Historic buildings are unique resources that permit people to distinguish one

⁸ Donovan Rypkema, *Culture, Historic Preservation and Economic Development in the 21st Century*, September 1999 (<http://www.placeeconomics.com/pub/PlaceEconomicsPUB1999.pdf>), 3.

community from another and help to form a market and brand niche, which attracts new investment and new residents.

Communities have become concerned about how they are branded in much the same way as companies worry about how the value of their product can be articulated to buyers. Communities that embark on branding often use focus groups or surveys to identify current impressions by residents and visitors to the community as it currently exists. This market research often identifies core values and issues that represent the past and how they can be made useful for communities. Market research helps to set them apart and create destinations within current recreational resources, historic residential neighborhoods, and downtown commercial districts.

A community or place brand is nothing more than an image of the place in the market. A brand is a name, sign, symbol, slogan, or anything that is used to identify and distinguish a specific [product](#), [service](#), place, or [business](#).⁹ People engaged in branding seek to develop or align the expectations behind the brand experience, creating the impression that a brand associated with a product or service has certain qualities or characteristics that make it special or unique.¹⁰ Because brands “represent the sum of all valuable qualities of a place to the consumer,” they must be grounded in the truth; else the effort to create the brand will be discarded by consumers who are confused when interacting with the product or community.¹¹ A brand is not a tagline; it represents the whole experience of living in the community.

Many public history organizations surveyed have worked hard to promote a “sense of place” in their communities, in essence to promote and reinforce their brand. One example is the Swarthmore Home and Garden Tour conducted every other year by the Swarthmore Historical Society. The public invitation and showcase of these unique homes and historic resources reinforces that Swarthmore is a special place with a unique and strong “sense of place.” The Swarthmore tour program is just one example of many programs and initiatives conducted by public history organizations across the county to reinforce their unique characters and community brands. Programs such as house tours, heritage festivals, art events, and special activities contribute demonstrably to a community’s “sense of place.”

Sense of Identity

In addition to a “sense of place,” public history organizations work to promote a “sense of identity.” In the marketplace of communities across the region, communities compete with each other for new residents, business investment and tourists. The sense of identity is a crucial part of differentiating how a community is perceived in the regional marketplace. Communities with strong identities will capture more of the market in terms of residents, investment and tourism. A recent study by the Delaware Valley Regional Planning Commission identified “quality of life” as a major opportunity for the region.¹² Many historic Delaware County communities have unique architecture, housing, walkability, transit-oriented

⁹ Ibid.

¹⁰ Ibid.

¹¹ Ibid.

¹² *Integrating Land Use, Transportation, & Economic Development: Activities & Major Findings FY 2007 & 2008*. Delaware Valley Regional Planning Commission October 2008 (<http://www.dvrpc.org/reports/08020.pdf>), 31.

development, and commercial corridors; all of which are defining elements of “quality of life” and livable communities.

Active efforts to maintain a “sense of identity” is one form of engaging citizens to care about their community by focusing on retaining special historic places. Involved local citizens can be counted on to establish a local theater company, or upgrade a playground, or restore a downtown district for benefit of all residents. These active citizens wish to help because they identify and want to contribute to the betterment of their community.



Lansdowne Avenue, Lansdowne

One example of building an identity is the work associated with historic commercial district revitalization. Efforts to revitalize historic commercial corridors across the United States have been underway for more than 25 years and have been used in more than 1800 communities. Under the banner of the National Trust for Historic Preservation, the Main Street Four Point Approach™ is an historic preservation based, volunteer driven, economic development strategy used extensively in more than 47 states.¹³ Here in Delaware County, the Borough of Lansdowne is using this methodology to revitalize the historic commercial corridor. All of these programs

work in pedestrian-oriented historic commercial districts whose identities are embodied in the existing buildings that make the corridor great. While this approach is currently only being utilized in Lansdowne, this approach could be expanded to many other communities in the county with pedestrian-oriented historic commercial corridors.

In communities with historic commercial corridors and historic landmarks, historic buildings are viewed as possible “anchors” for community development and important parts of a community “identity.” One example, the proposed restoration of the Lansdowne Theater, is part of a broader effort to revitalize this historic shopping district. While the Lansdowne Theater was a grand suburban movie palace from the 1920’s, its decline into the 1960’s and final closure in the 1980s was symptomatic of market forces in the entertainment industry. Today, the property has been purchased by a nonprofit corporation and re-use planning has progressed to reposition the property into a community asset. Adjacent storefronts have been repaired and now house a coffee house which has become a community gathering spot. A video rental shop occupies another storefront. Professional offices upstairs have been rented, bringing new life to a block that has for decades been dark and abandoned.

Across the county, historical organizations are encouraging the preservation and re-use of these commercial corridors and historic resources as centers of community, active use, and employment. Their action plans to enhance community identity are a major part of the county’s revitalization efforts.

¹³ National Trust Main Street Center (www.preservationnation.org/mainst).

Sense of Evolution

Historic communities in Delaware County also reflect a “sense of evolution.” Very few communities can be “frozen in time,” and in Delaware County communities are living places. Many communities with historic resources utilize these resources as living, productive centers of activity. Delaware County residents live in historic houses now as they have for more than 100 or, in some cases, 200 years. Historic commercial corridors serve as a nexus of retail, entertainment, and commerce. The historic resources of these communities promote a “sense of evolution” and development of the community over time.

These communities are still great places to raise families, start businesses, enjoy leisure activities, and retire. Like the residents of the past, today’s residents are writing the next chapter of the history of these distinct communities.

Sense of Ownership

Public history and historic preservation promote a “sense of ownership.” Many public history organizations within Delaware County work tirelessly to promote a sense of ownership within their communities. Ownership does not mean only physical ownership, but rather a sense of shared responsibility and community pride. For example the Radnor Historical Society, like many other public history organizations, promotes a historic house plaque program and conducts an annual awards ceremony to promote high quality maintenance and historic rehabilitation. These plaques, awards, and other special events promote a collective “sense of ownership” in the community. This fosters higher levels of investment, maintenance, and community stewardship.

Sense of Community

The most important “soft” benefit of public history is a “sense of community.” Public history organizations are centers of social capital within Delaware County. By sharing a sense of public history, residents feel a greater stake of ownership and connection to a community.

Sociologist Robert Putnam has identified social capital as a major component of civil society.¹⁴ But over the last half-century civic organizations have declined in importance and popularity. Falling participation in clubs, societies, and organizations as well as volunteer activities have weakened the strength of social capital in many communities. As social capital declines, physical conditions can decline leading to disinvestments, out migration, and abandonment. Many public history organizations have faced this challenge head-on and are working to reinvent themselves in a time of generational transition.

Public history organizations in Delaware County are fragile. Many are run entirely by volunteers and have budgets of less than \$25,000. But even with these macro-socioeconomic trends, public history organizations in Delaware County have survived as places for social capital and centers of community. These historical organizations are reaching out to new partners including schools and the environmental

¹⁴ Robert. Putnam, *Bowling Alone: America’s Declining Social Capital*, (1995) *Journal of Democracy* 6:1, 65-78.

community to promote sustainability and resource protection as a new community priority. The Grange in Haverford Township has a long relationship with the local environmental organizations and garden clubs and works with both to assure that the buildings and grounds are maintained for cultural, recreation, and environmental purposes. Public history organizations, building social trust and fostering a sense of civic pride and ownership, serve as sources of social capital and community identity.

In order to develop and grow the public history community, the Public History project has focused on developing an organized constituency of history advocates for Delaware County. As an add-on activity for this project, an on-line community called the Delaware County Historic and Preservation Network (www.dchpn.org) of more than 180 people who want to learn more about the historic assets in their communities has been created. Many of these people are currently involved in other civic pursuits, and their continued engagement with the history of their communities makes them advocates of broader quality of life issues.

Hard Benefits

Public History, Tourism and Economic Impact

Public History and tourism contribute directly to the economy of Delaware County. Tourism contributes more than \$760 million dollars of economic activity each year within the county according to the Greater Philadelphia Tourism Marketing Corporation.¹⁵ Close to five percent (4.6%) of all jobs in Delaware County rely on tourism, meaning more than 9,600 people depend on tourism for employment every day in the county. As a result of this economic activity, tourism contributes \$102 million dollars annually in local taxes.¹⁶

Heritage tourism still remains a bright spot in an otherwise unsettled tourism landscape. A recent national study shows that visitors coming to historic sites or historic districts stay longer, spend more money, and are better educated. An October 2009 research study by Mandala Research for the US Cultural and Heritage Tourism Marketing Council (USCHT) reveals that “78% of all U.S. leisure travelers participated in cultural and/or heritage activities while traveling, translating to 118.3 million adults each year [nationally.] With cultural and heritage travelers spending an average of \$994 per trip, they contribute more than \$192 billion annually to the U.S. economy.”¹⁷

¹⁵ *The Economic Impact of Tourism in Greater Philadelphia*, May 2009, Tourism Economics (http://c0526532.cdn.cloudfiles.rackspacecloud.com/Economic_Impact_Report.pdf).

¹⁶ Ibid.

¹⁷ Mandala, Laura, “New Study Reveals Popularity of U.S. Cultural and Heritage Travel: Large, Affluent Market Focuses on History and Tradition,” for the U.S. Cultural & Heritage Tourism (USCHT) Marketing Council, October 21, 2009 as found at <http://www.uscht.com/>.

The study by Mandala Research for the U.S. Cultural & Heritage Tourism (USCHT) Marketing Council, in conjunction with the U.S. Department of Commerce. Heritage Travel, Inc., a subsidiary of The National Trust for Historic Preservation, and its website www.gozaic.com was lead sponsor of the study. Other sponsors include American Association of Museums; California Travel and Tourism Commission; Center for Socioeconomic Research and Education at Texas A&M University; Chicago Office of Tourism; Positively Cleveland; Visit Florida; The History Channel Magazine; Marriott International; Museum Store Association; Sarasota and Her Islands Convention and Visitors Bureau; Shop America Alliance; Vantage Technology Partners; and the Virginia Tourism Corporation.

Delaware County can maximize the value of its historic sites and historic districts by promoting them to visitors. The Brandywine Conference and Visitors Center has made some attempts at engaging tourists to stay longer, but the county's lacks some of the necessary tourism infrastructure to develop these activities. Theme tours and cooperative projects can link historic sites together, thus creating additional opportunities for quality visitor experiences and overnight stays at hotels.

The research of this project, which will be detailed in later chapters, identified that staffed historic sites within the county welcomed more than 205,000 visitors in 2008.¹⁸ Historic sites that have staff received the bulk of measurable impact of direct tourism. Other historic places in Delaware County, including historic parks, historic commercial corridors, and special sites, received visitors as well.

Many visitors to Delaware County choose to visit historic sites. If these historic sites were to close, decline or disappear, the economic impact on tourism and investment in Delaware County would be substantial. The loss of visitors would have a heavy impact on tourism related businesses including restaurants, retailers, and recreation venues in addition to the associated decline in local sales tax receipts.

Conversely, targeted investments by government to improve visitor readiness, better quality interpretation, and varied public history offerings can expand tourism, thus creating more economic activity, jobs and tax receipts for county and local governments. Currently Delaware County receives the smallest share of visitors to the Philadelphia Region, just eight percent of total visitation within the five-county area.¹⁹ Further investments in the historic resources of the county are recommended in later chapters.

Many historical organizations and historic sites conduct events and festivals targeted for tourists. For example, the Chadds Ford Historical Society hosts three well-known special events annually (Pumpkin Carve, Chadds Ford Days and Candlelight Christmas house tours). These high-quality events draw thousands of attendees. These events require large capital investments, many volunteers, and much preparation. These events draw many tourists from the region to participate in public history festivities. With concentrated effort, tourism development can occur in Delaware County with the cooperation of staffed historic sites, volunteer run sites, and the Brandywine Conference and Visitors Bureau.

Local Historic Districts and Effects on Property Values

Five communities in Delaware County have Historic Architectural Review Boards known commonly as HARBs.²⁰ These boards regulate local historic districts to preserve the integrity of historic resources. Research has demonstrated that locally regulated historic districts have a positive effect on property

¹⁸ This figure is lower than actual visitation. The survey received responses from most staffed sites within the county, but those sites which did not respond did not contribute to this estimate.

¹⁹ *The Economic Impact of Tourism in Greater Philadelphia*, May 2009, Tourism Economics (http://c0526532.cdn.cloudfiles.rackspacecloud.com/Economic_Impact_Report.pdf)

²⁰ These include Media, Ridley Park, Chadds Ford, Lansdowne, and Radnor Township.

values including both value appreciation and value preservation for both homeowners and investors. Many studies have analyzed the positive effect of local designation.²¹



North Wayne Historic District, Radnor; Example of
Act 167 Local Historic District

Overall, these studies have found that locally regulated historic districts appreciate faster than their non-regulated counterparts. This value appreciation can range from five to thirty five percent.²² Additionally, locally regulated historic districts have higher levels of homeownership and longer residential tenure, both positive elements of value. Residents of locally regulated districts also have higher rates of participation in community organizations and neighborhood associations fostering a sense of community and civic pride, according to the study.

Citizen activists concerned about the long-term health and vibrancy of their neighborhoods often turn to regulation as a means to assure that historic buildings are well maintained and preserved over time. This is often an outgrowth of a local controversy to save or preserve a singular historic structure. Public historians concerned about local history often must become civic activists when trying to assure that precious historic buildings are not demolished for schemes that meet only today's economic agenda and the politics of the moment. The historic preservation movement as a whole has been extraordinarily effective in halting blight in historic neighborhoods and districts in the past 35 years, by creating civic interest groups and societies to advocate and press local government to enact local preservation ordinances to protect historic properties from demolition and neglect.

Connecting Public History to Revitalization

Revitalization is a large area of interest for the Delaware County Public History Feasibility Study and Implementation Plan. Revitalization means to “impart new life or vigor” in a community. The interest in and desire for revitalization emerges in response to trends of disinvestment, outmigration, and economic decline in aging Delaware County communities. With both “hard” and “soft” impacts, public history can be a valuable tool for communities to revitalize and address socioeconomic community challenges.

One example, Southeastern Delaware County, a region defined by first-generation suburbs, lost five percent of its population between 1990 and 2000.²³ Between 2000 and 2025 the Delaware Valley Regional Planning Commission projects that Southeastern Delaware County will lose an additional 12% of its population. This out migration and general decline leads to a higher concentration of poverty, higher vacancy, and higher rates of unemployment.

²¹ *Benefits of Residential Historic District Designation for Property Owners* by Jonathan Mabry, Ph.D. (http://www.tempe.gov/historicpres/Resources/HPO/Historic%20District%20benefits_Mabry_%206-7-07.pdf)

²² Ibid.

²³ 1990 and 2000 US Census; Delaware County Planning Department.

In the face of these trends and projections, public history is a valuable tool to reverse or soften the trend of disinvestments and revitalize these communities in Southeastern Delaware County. The Delaware County Council recognized in 2003 the value and the need to revitalize the aging communities in Eastern Delaware County. The Delaware County Revitalization Program was established with the “goal of revitalizing the County’s first-generation municipalities by making them more attractive, livable, safe and economically viable.”²⁴ Most of the action plans completed by the County identified similar key initiatives and responses. Many of the plans included public history methods as possible tools for revitalization.

One community in Southeastern Delaware County, the Yeadon Historic Preservation Committee, has promoted public history as a revitalization tool in pressing for the designation of historic resources including the Palmer Site and Hertford Place to prevent these buildings from demolition or neglect. The group has petitioned local government for a demolition delay ordinance after the historic Bonsall House was demolished in 2006. The aspirations for the future of the community’s historic buildings and public history are articulated passionately in the Yeadon Community Preservation Plan, which states that:

“Yeadon is justifiably proud of its heritage - a heritage that includes its streets, its buildings, and its landscapes as well as the people who have lived here and the events that have taken place here. The community feels strongly that if it is to move forward and thrive in the future, it must build on its character and its past.”²⁵

“It has been shown that successful communities express a sense of pride and a common vision of what the future of their community can be. They value quality development based on appreciation for the natural and historic resources that make their community unique. Yeadon, in its unwavering intention to always be successful, has been very clear about those values.”²⁶

Yeadon is taking the affirmative steps to utilize public history as a revitalization tool. By using the assets and resources of the past, Yeadon and its Preservation Task Force are working to build and develop the traits of a quality community, fostering revitalization to make Yeadon more attractive, livable, safe, and economically viable.

Conclusion

As has been introduced here, and will be reinforced throughout this report, public history contributes directly to the five senses of quality communities. Public history has a direct impact on tourism and

²⁴ Delaware County Revitalization Program

(<http://www.co.delaware.pa.us/planning/countyregionalplanning/revitprogram.html>)

²⁵ Yeadon (PA) Community Preservation Plan, Section 6. Found at www.elibrary.state.pa.us/dldoc.asp?fn=4204586968mcp0130.pdf

²⁶ Ibid.

associated economic activities. Public history has measurable effects on neighborhood value and residential patterns. Investment is needed in the historical organizations that safeguard this heritage for generations to come.

Summary of Findings from the Surveys and the On-Site Visits and Interviews

Participation in Surveys

Heritage Consulting Inc. surveyed the 80 historical organizations in Delaware County as part of the Delaware County Public History Feasibility Study and Implementation Plan in fall 2009 to obtain baseline information about the variety of historical organizations in the county. Listed below are the survey response rates of the three identified historical organization categories (each received a specified survey).

- Historic Sites and Organizations
 - 80% (49 responses out of 61 organizations)
- Historical Architectural Review Boards (HARBS)
 - 80% (four responses out of five HARBS)
- Historical Commissions
 - 64% (nine responses out of 14 Historical Commissions)

This report is organized into several sections. Three surveys were conducted. Highlights of the results for each survey along with highlights from the 40 one-on-one interviews are provided. Throughout this report strengths, weaknesses, threats, or opportunities are identified as a means to highlight situations that are noteworthy. Finally conclusions about the most significant issues that county historical organizations must address in the near future are provided.

Survey Highlights—Historic Sites and Organizations

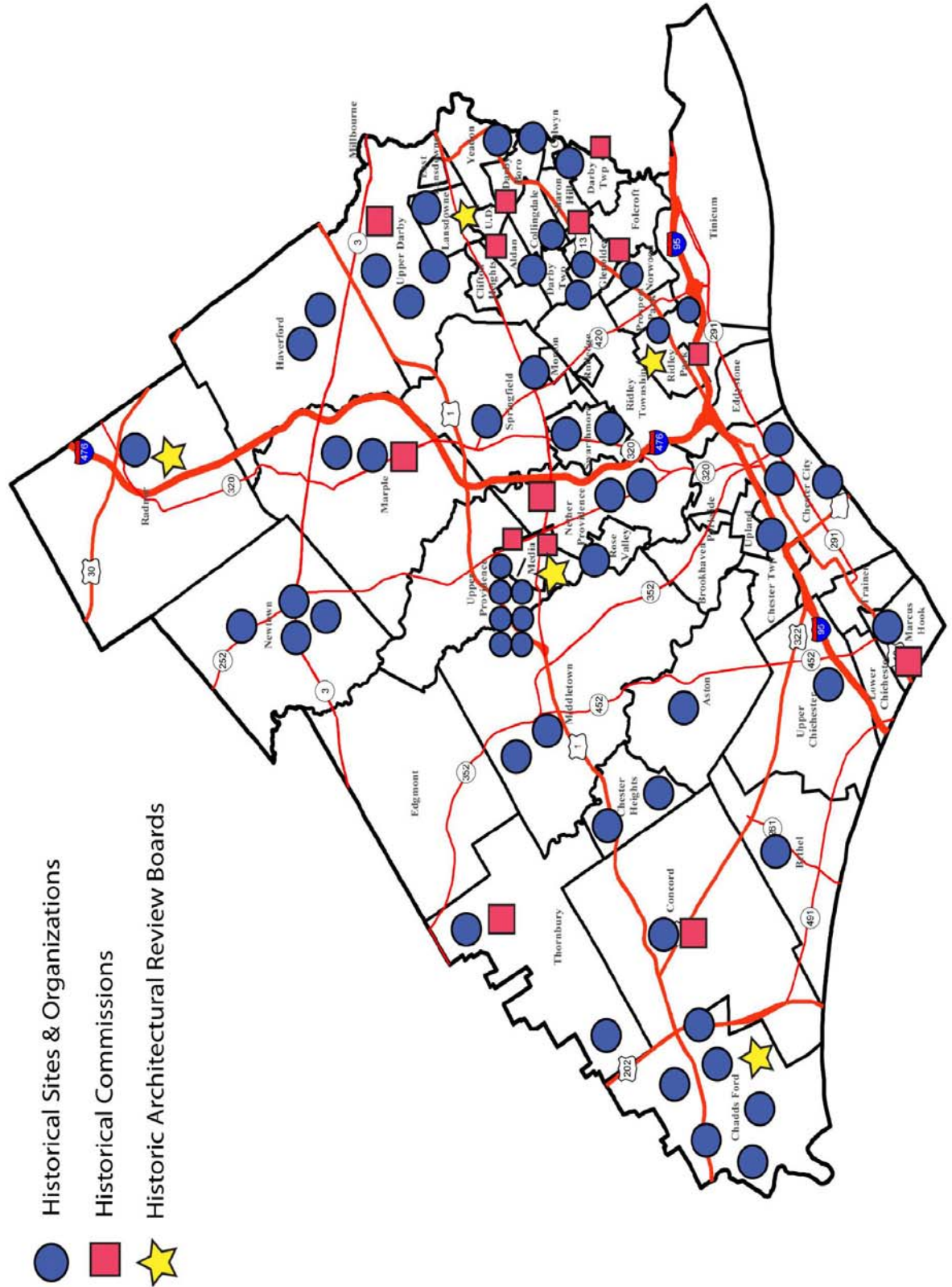
The following section contains highlights from 49 organizations that identified themselves as historic sites, historical societies, or preservation organizations. This group, which included countywide and municipal-scaled historical societies and site-specific groups, represented the majority of the survey responses. Of those 49 sites/societies, 31 operate or control an historic site. Those 31 organizations that operate historic sites are referred to as sites in this section of the report. The term historic sites/societies refers to all 49 organizations.

Organizational Statistics

These include historic sites/societies that own sites, manage municipally owned historic buildings, collect materials and objects, create archives, and have become the de facto local preservation organizations in their municipality because “no one else in town cares about historic buildings.”

More than half (54%) of Delaware County historic sites/societies have undertaken some advocacy about threatened or underutilized historic buildings to local elected officials in the past. These are often around budget issues or the threat to a historic building in town. Letters and visits to elected officials were most common.

Delaware County



Nationally, there is an ever increasing number of local nonprofit organizations starting each year, and Delaware County historical organizations are no different.²⁷ Fully 25% of all the organizations surveyed have begun since 2000. This rapid rate of start-ups has implications for organizational services and for competition among existing organizations for limited resources. The interviews revealed that nine entities are considering starting up new historical organizations in the county.

Historic Sites Ownership and Management

All 10 staff sites operate or control historic sites. In addition, 21 of the 39 volunteer-run historic sites/societies operate or control a historic site. Five of the staffed sites that own their buildings have endowments. This is a strength as staffed sites have larger budgets and resources to manage their sites.

Six volunteer-run sites own their buildings. Two of these volunteer-run sites have large sums held in CDs in the form of working capital. The remaining four sites do not have any endowments or working capital accounts and are therefore vulnerable because there is no financial cushion.



Caleb Pusey House, Upland Borough
Owned by Friends of the Caleb Pusey House, Inc

There are 14 municipally owned historic sites. Volunteers manage eleven of the sites. However, five of these sites have investment accounts or working capital in sums ranging from \$10,000 to \$150,000. Sites/societies with adequate budgets and investment accounts may have the capacity to assist the municipality in maintenance and repairs. Not all of the municipal site stewards are so equipped because they lack the organizational and fundraising capacity. As new organizations form, it will be very important to clarify the roles and responsibilities of both the organization and municipality in operating the historic site. Some funding sources will not give to organizations that do not hold titles or have formal leases for the properties.

Ten of the sites report that they are the only ones who maintain their properties. Other sites note that the municipality provides maintenance (often mowing the grass or providing actual repairs to the building) at four sites. Another four sites have partnerships between the local organizations and the municipalities to provide maintenance services.

Three staffed sites manage buildings that they do not own. Two other staffed sites manage municipally-owned properties. Another volunteer-run site manages a SEPTA train station.

Fifty-seven percent of the sites do not have formal agreements with their municipalities such as a lease or operating agreement. This is a weakness, but there is little to do except encourage new formal

²⁷ Stephanie Strom, "Grab Bag of Charities Grows, Along with U.S. Tax Breaks," *The New York Times*, 6 December 2009, 1.

agreements outlining roles and responsibilities between the nonprofit organization and its municipality. Some municipalities look to the nonprofit “Friends of” group as the major fundraiser for these buildings, but these groups may not have the financial capacities to take on such responsibilities.

Analysis of the Physical Sites

Overall, 77% of the surveyed sites/societies report that their sites are well maintained. The useful life of many building systems has come to an end and many require system replacement or upgrades. Sixty-four percent of the sites were restored more than 25 years ago.²⁸ The top four services that sites report are needed are:

- Paint (eight sites/societies),
- HVAC (six sites/societies),
- Total renovation (five sites/societies), and
- Structural repairs (four sites/societies).

There are 138 buildings on these 31 historic sites. This number far magnifies the concerns about deferred maintenance. For small sites with no working capital or endowment, these additional buildings, be they barns, springhouses, tenant houses, etc., are vulnerable because there are many more structures than the historical sites/societies have the ability to maintain. Many sites have restored their main buildings, but the outbuildings are in different stages of rehabilitation.



Lansdowne Theater, Lansdowne

All of the 31 historic sites provided lists of needed capital repairs, but only 15, less than half, had real or “hard numbers” versus “back of the envelope” cost estimates. The total amount of money needed as reported by half of the historic sites was a staggering \$22,154,000. This total is a mix of estimates and hard costs from reputable contractors.

There are two very expensive projects included in this \$22 million dollar sum. One is \$10 million for the rehab of the 1704 Brinton House barn into a museum and community center. The other is the \$10 million restoration of the Lansdowne Theater. Both of these groups report that these are very preliminary cost estimates. The remaining capital costs are a more reasonable but still significant sum of \$2.2 million.

The remaining half of the sites did not have estimates for needed repairs or restoration, indicating that they had not yet embraced the urgency of the repair.

Visitation to Historic Sites

Visitor readiness is also varied. This would be defined as:

²⁸ Many sites were restored during the Bicentennial, and more than 33 years has passed since the celebration.

- Is the site ADA compliant,
37% yes;
- Does the site have a place to park a tour bus?
90% yes;
- Does the site have a parking lot?
68% yes;
- Does the site have a public restroom?
73% yes; and
- Does the site have a website?
77% yes.

All of these components are critical if historic sites wish to welcome visitors, be they out of town visitors, schoolchildren, or community members. However, the biggest impediment to inviting visitors or even neighbors to the site is regular open hours that are adequately publicized.

The number of open hours to the public varies widely. More than a third of all site/societies surveyed do not have regular open hours for the public. This is a fundamental concern because the society or the site then is not available to undertake its educational mission for the public. However, at volunteer-run sites this is more problematic.

Forty-five percent of the volunteer-run sites are not open regular hours. These sites are only open by appointment. This means that a casual visitor cannot view the site unless he calls ahead and a volunteer is available when the visitor wishes to come. This arrangement is not acceptable if sites wish to attract tourists who come at any time during open hours. The small number of sites with regular open hours on both weekend days is a weakness.

Here in Delaware County there has been an upswing in visitation to staffed sites. Staffed sites get the majority of visitors, which is not surprising, because they have sophisticated marketing, programming and tourism activities. In Delaware County the total number of adult visitation to all staffed sites increased from approximately 171,000 to 191,000 over three years.

Visitation to volunteer-run sites is up from approximately 12,000 in 2006 to 14,000 in 2008 based on survey results. Total visitation to these sites varied from 19 visitors to 2000 visitors yearly. The average number of visitors is 653 visitors a year.

Interpretive Plans at Historic Sites

Seventy-four percent of the historic sites do not know of or do not have an interpretive plan, which is a written document that includes the background research and materials used to identify the themes for tours and public programming. This is considered baseline information in the historic site field and is used to train docents as well as paid guides for their work with visitors.

An interpretive plan for each site would help identify the existing stories and create new ones to be told to help to differentiate each site from the others. An interpretive plan is a touchstone for telling the historical “story.”

Historic sites/societies use a variety of methods to reach the public. The top five methods are as follows:

- Tours 87%
- Websites 77%
- Exhibits 63%
- Events 62%
- Books 54%

The historic sites overwhelmingly depend on the guided tour as their primary form of interpretation.

The interpretive stories told at Delaware County historic sites reflect that the majority of sites are 17th and 18th century homes of Quaker settlers. The top interpretive themes are:

- Family
- Domestic architecture
- Religion
- Agriculture
- The American Revolution

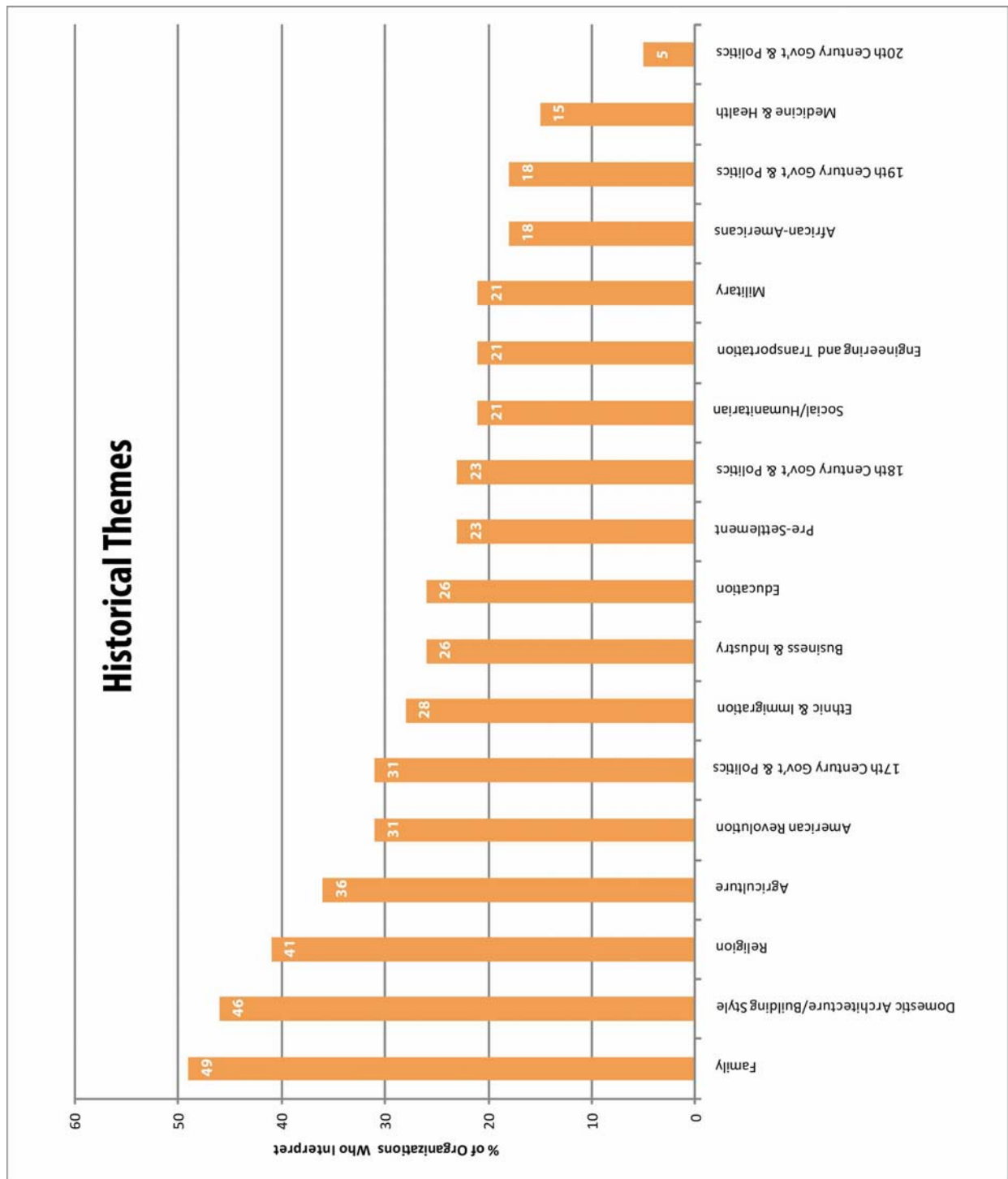
There are a handful of sites throughout the county, less than 30%, that interpret other themes, such as engineering and transportation, African Americans, 19th century government and politics, education, or business and industry. This is a major opportunity to create programming around themes, joint projects and tours for sites/societies, and to extend the stories about the county beyond the current dominant story of wealthy Quaker families from the 17th and 18th century. These new stories are one of the most promising ways to engage new audiences.

Volunteer Management



Morton Morton House, Norwood
Operated by Volunteers of Norwood Historical
Society

Solely volunteers manage 79% of all sites/societies. Twenty-one percent, just 11 sites/societies, have full or part-time staff. Volunteers drive the majority of the historic sites and societies in Delaware County. This high percentage is both a weakness and strength. These sites/societies are most often small with budgets under \$25,000 and thus have limited capacity to undertake all the work that their missions dictate. On the other hand, their size is a strength because they are not saddled with staff salaries and expansive overhead costs that require constant fundraising. These small sites/societies are potentially nimble and could respond to opportunities when presented. This high percentage of local sites/societies run solely by volunteers—even some that own real estate—is not unusual.



The median number of volunteers was 15 and the individual numbers of volunteers at each site/society varied from zero to 300. Staffed sites had more volunteers than volunteer-run sites possibly because staffed sites have staff to manage volunteer programming, recruitment, and retention.

Of the 31 sites, 15 had fewer than 10 volunteers. Two-thirds of the 31 had fewer than 20 volunteers. The small volunteer corps is a weakness that training might be able to mitigate. Surprisingly, 30% of site/societies reported their volunteer corps as growing, and fewer than 25% said it was declining. Many site/societies are doing recruitment and retention one volunteer at a time, but this may not be enough to sustain their site/societies for the long-term.

Financial Statuses of Historic Sites/Societies

Thirty-one percent, or 18 of Delaware County historical site/societies, reported that they had endowments, board designated funds that act like endowments, or working capital. The existence of some kind of organizational financial reserve implies that the site/society will continue and can weather some financial turbulence. All but three of the 11 staffed site/societies had some kind of endowment or board designated funds that act like endowments. The staffed site/societies have true endowments that are invested, and a small percentage each year is used for operating expenses. Only one of the 39 volunteer-run historic site/societies has an endowment or board designated fund that acts as an endowment.

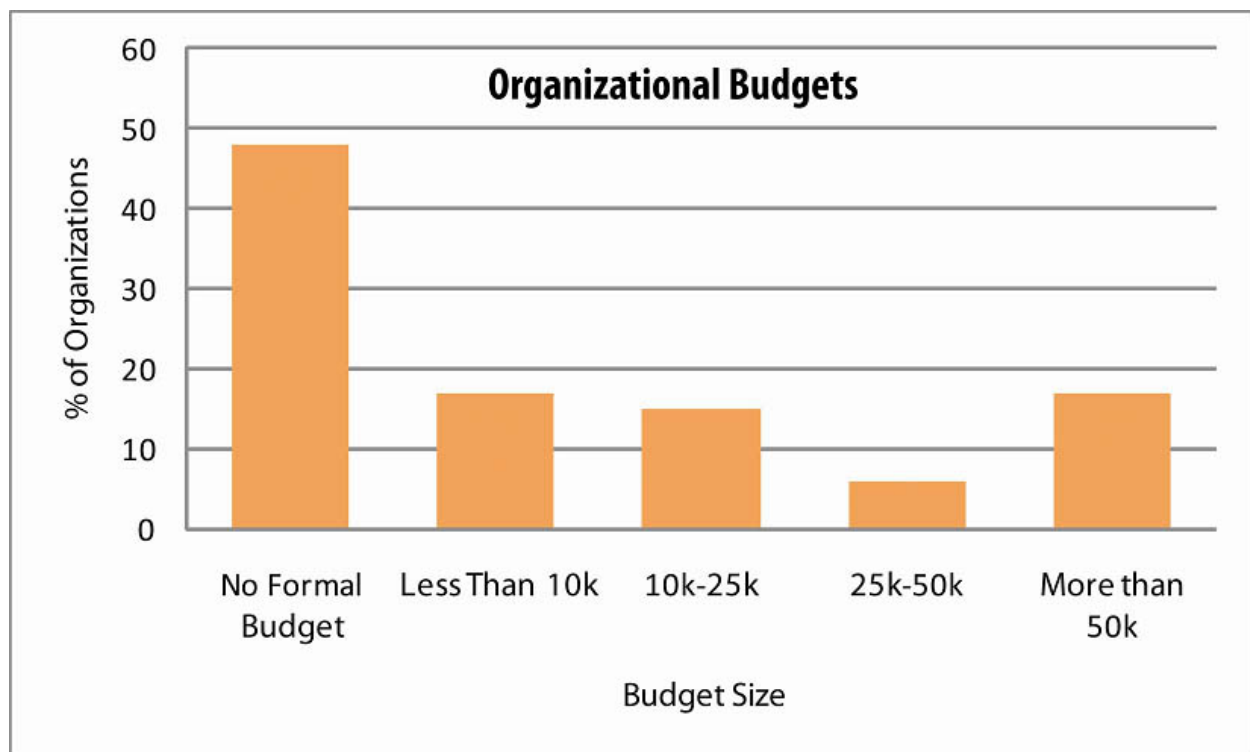
Six volunteer-run sites own their buildings. Two of these volunteer-run sites have large sums held in CDs in the form of working capital. The remaining four sites do not have any endowments or working capital accounts and are therefore vulnerable because there is no financial cushion. This is an opportunity to ask board members and others long associated with the site/society to consider mentioning the site/society in their wills. A planned gifts training session could be very useful to help the smaller sites/societies understand about asking to be remembered in board member's wills with a bequest.

Almost half (48%) of the responding sites/societies do not have formal organizational budgets. The lack of a formal budget has many implications, but especially for fundraising purposes. Formal funding sources, such as foundations, government granting agencies, or some individual donors, will not support organizations without formal board-approved organizational budgets. Half of the sites/societies did not report their budget sizes, indicating that they probably fall under the \$25,000 threshold for submitting an annual tax return (Form 990) to the Internal Revenue Service.

Additionally, volunteer-run sites/societies do not have the capacity or are not permitted to apply to some of the major Philadelphia area funders. The Pew Charitable Trusts and The William Penn Foundation require applicants to have full time staff.²⁹ Other granting agencies, like the federal Institute of Museum and Library Services, have application forms that are so onerous that special expertise is required (and formal budget) even to apply.

²⁹ See applications for funding from the Heritage Philadelphia Program at <http://www.pcqh.us/heritage/apply>.

Seventeen percent of the volunteer-run sites/societies have budgets under \$10,000. Fifteen percent of the sites/societies have budgets from \$10,000 to \$24,000, and five percent have budgets between \$25,000 and \$50,000. On the whole, these are very small organizational budgets. This would indicate that these sites/societies have yet to penetrate their communities or have not yet become community anchors. Despite their small sizes, almost half (47%) of the sites/societies surveyed had budget surpluses in the last three years, and only 14% had deficits. Delaware County historic sites/societies seem to be well managed despite their very small budget sizes.



The following is a list of the five top sources of financial support for Delaware County historic sites/societies.³⁰

- Members 45%
- Fees/earned income/admissions 41%
- Endowment 19%³¹
- Local government 18%
- Sponsorships 12%

Eighty-three percent of the reporting sites/societies say that some or all board members are involved in fundraising. Board members mostly participate in events and make individual donations.

³⁰ These are average percentages for each organization in each category. Note they do not add up to 100%

³¹ Eleven organizations reported endowments on the survey. Interviews showed however that another six sites have working capital, which they do not define as an endowment or board designated fund that acts like an endowment. See the section of this report on Highlights from Interviews for more information.

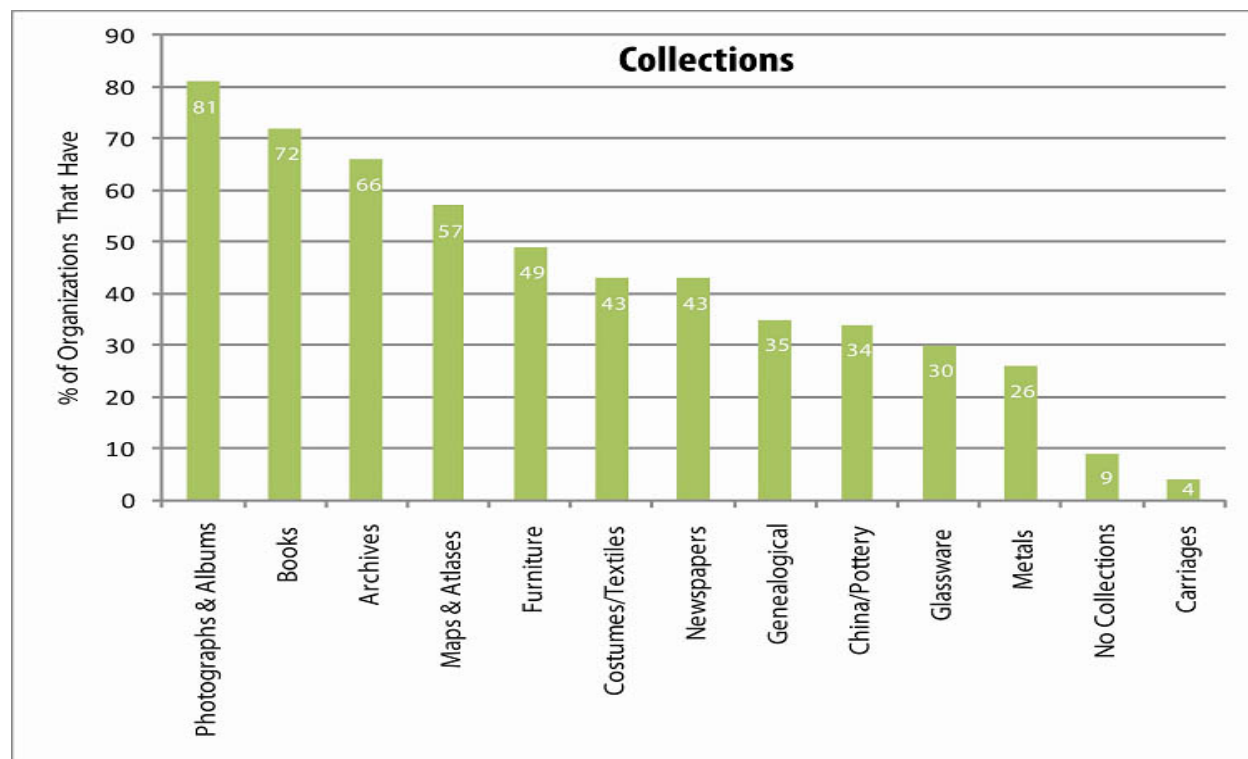
No volunteer-run site received money from the most common grant sources for history projects: the Federal Institute of Library and Museum Services, the Pennsylvania Historical and Museum Commission, the William Penn Foundation, The Pew Charitable Trusts, or State or County sources.

The staffed sites have been far more active in making proposals to the federal Institute of Library and Museum Services, Pennsylvania Historical and Museum Commission; County managed Community Development Block Grant funds, the William Penn Foundation, and The Pew Charitable Trusts. Several of the county historic sites/societies have excellent development offices that have been very successful in tapping funds from these and other sources.

Five sites received Legislative Initiative Grants (LIGs) from their local State Senator, and these typically range from \$5,000-\$10,000. In the 2009-2010 Pennsylvania State Budget these were eliminated in order to close a budget gap. These grants may or may not return in future budgets, and these sites/societies may have difficulty with the loss of this funding source.

The Collections of Historic Sites and Societies

The survey indicated that the collections of the Delaware County historic societies and sites are primarily paper-based (books, photos, albums, archives, maps, etc.). Only four out of the 15 historical societies have sites to store their collections. Some artifacts and records are stored in individual board members' homes, often in basements or attics.

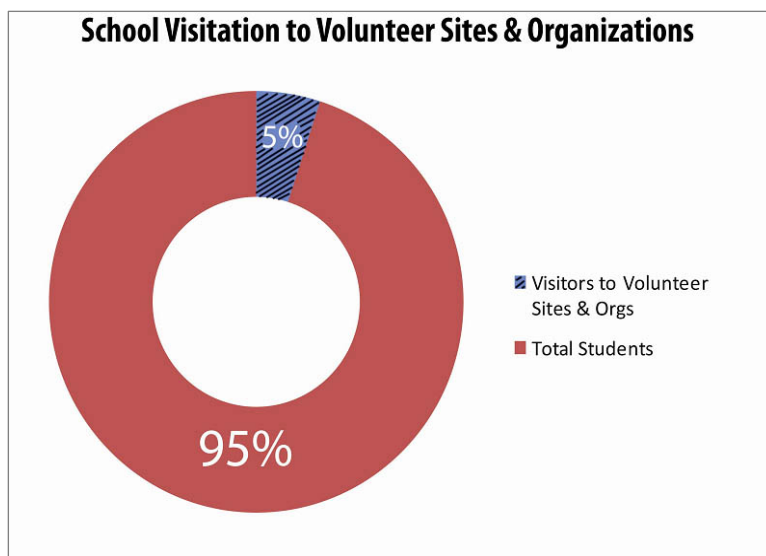


These materials are not formally catalogued or accessioned and are at risk of loss. This impairs the sites/society's service to the public. Fourteen percent said that nothing to 10% is accessioned and/or catalogued. These collections are held in the public trust and need to be available to researchers. The lack of storage and active care for collections at volunteer-run sites is the most significant weakness identified in this project.

Historic Sites and Societies School programs

The Pennsylvania Standards for History are the baseline curriculum standards that any local school district must teach according to state law. Each school district is free to decide how its curriculum will cover these standards. These standards are not unattainably complex, but they do require some sites to make programming changes to better reach and communicate with active learners. More than 70% of the volunteer-run historic sites are unaware of these standards or do not have educational programs that meet these standards. This is a major weakness but also an opportunity for improvement through lesson-plan development and collaboration.

Despite the upswing in tourism to Delaware County historic sites, the number of visits by school children is declining or is uneven during the last three years.



Visitation by school groups to all sites:

- 48,723 in 2008,
- 49,317 in 2007, and
- 50,523 in 2006.

School field trips to staffed sites are driving the visitation:

- 46,000 in 2008,
- 45,000 in 2007, and
- 44,000 in 2006.

There are a total of 60,000 students in Delaware County.³² Some visitation statistics reflect out-of-county school groups and field trips.

Volunteer-run sites saw visitation of students grow from approximately 4,400 to 4,900 in the three years from 2006 to 2008. The numbers of school visitors at these sites varied from zero to 1000 a year, with the average being 246 a year. With 4,900 school visitors, volunteer-run sites are penetrating just five percent of the total student population in Delaware County.³³

³² www.dciu.org

³³ Ibid.

While so many historic sites want to work with schools, only 31% do currently. Sites reported different reasons for the lack of participation. These included tight local school budgets, standardized testing, availability of buses, teacher apathy, and the decline of interest in local history. These issues are addressed in the School Inclusion Chapter (page 60) outlining how local historic sites can begin to work with their school districts to create both relationships and necessary lesson plans to encourage school visits to their sites.

Historic Sites' and Societies' Organizational Needs

The top organizational needs expressed by survey respondents for all the 49 historic sites and societies are similar to those found in the September 8, 2009 Kick Off Meeting.

- Volunteer recruitment 72%
- Fundraising strategies 49%
- Marketing and advertising 28%
- Strategic planning 33%
- Board and officer succession planning 31%

There was minimal difference between the lists of services that sites/societies would seek for free versus pay a small sum.

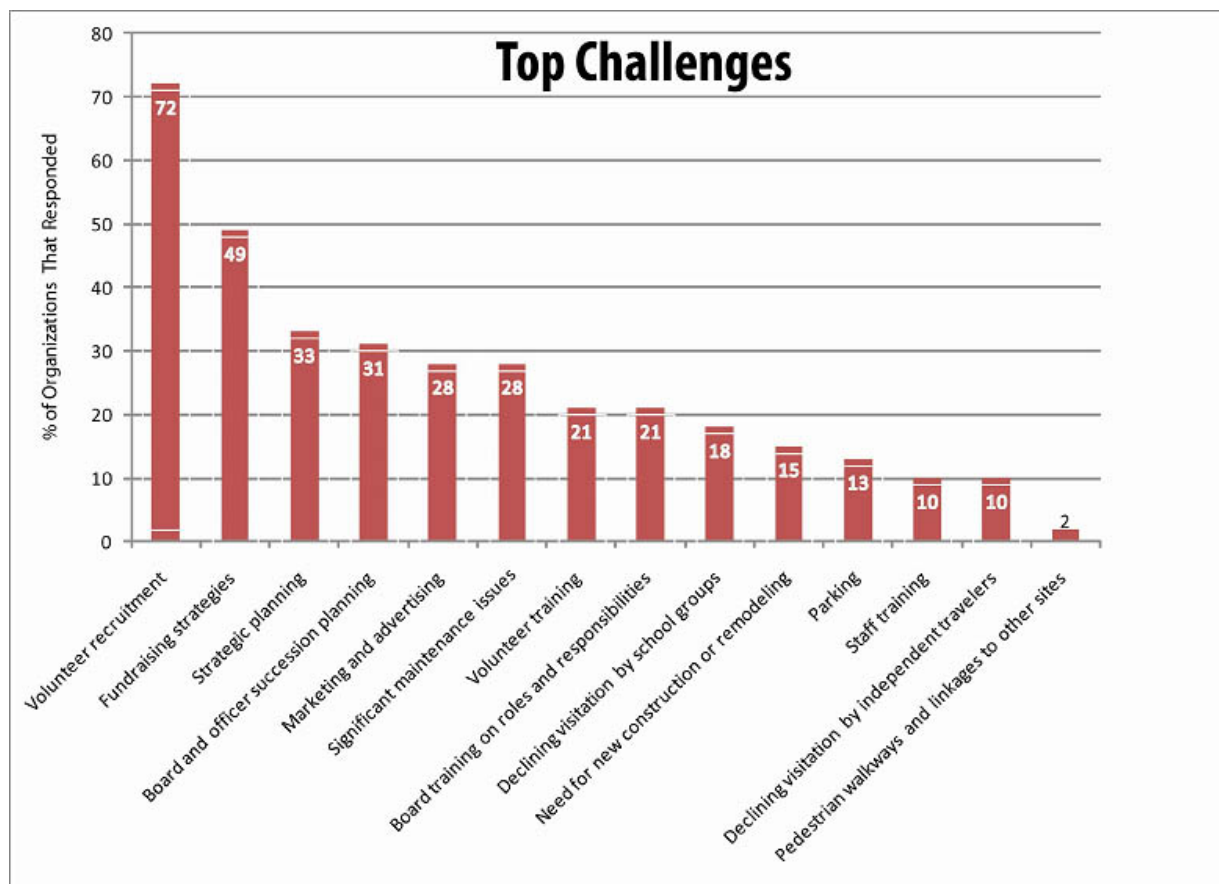
- Fundraising assistance 70%
- Collections management and conservation 42%
- New interpretive programs that link one site with other organizations 35%
- Marketing the site and increasing awareness 38%
- More/ better research for interpretation and education 33%

Collaborations

Seventy-five percent of volunteer-run sites and 88% of staffed sites report that they currently collaborate. This is mostly with tour activities. Sites/societies stated they want to collaborate in these areas in the future:

- Marketing the site to increase awareness 58%
- Fundraising 58%
- More or better research for interpretation and education 58 %
- New interpretive programs that link sites together 55 %
- Collections management and conservation 53%

Please see the section later in this report on highlights from the one-on-one interviews for further interpretation of these survey results.



Survey Highlights—Historic Architectural Review Boards

There are five PA Act 167 Historic Architectural Review Boards (HARBS) in Delaware County, and 80% of them participated in the survey. These bodies are made up of municipally appointed individuals, in accordance with state enabling legislation, who possess a variety of skills (architect, realtor, local historian, etc.). Only one of these municipally constituted bodies has staff. The remaining HARBs manage the Certificate of Appropriateness process by the volunteers that serve on the HARB.

These HARBs each review fewer than 25 Certificates of Appropriateness applications each year, which is a modest number given the scope and complexity of many of the communities and historic districts that these commissions administer.

All HARB members are required to attend outside training on a regular basis as part of their responsibilities, but three quarters of those responding to the survey admit that they do not attend training regularly. However, three of the four sites/societies that responded reported that at least one person has attended training in the last two years. The Pennsylvania Historical and Museum Commission typically offers this training. Additionally, two of the four HARBS did not offer any training for new members while another one provided copies of the ordinance, and one promoted training sessions with state Department of Community and Economic Development. All of the HARBS are

interested in more commission training, however. The convenience of the training and the timing (in the evening or on the weekend) may be the impediments for more commission members to take advantage of existing offerings.

The top issue affecting historic resources in HARB communities is unapproved work done to landmark buildings (75%). Fifty percent say that landmark owners are unable to afford appropriate repairs. Others noted overturns of HARB decisions by the city council and the inability to designate more properties as other concerns. HARB members also seek stricter enforcement of their preservation ordinances (residents doing work without approval), transit oriented development in historic districts, getting more districts designated, design guidelines, making their recommendations have more teeth, and recognition by residents of benefits of a HARB.

The HARBs have taken a much more aggressive effort to reach the public. Half (50%) have websites, mailed newsletters, or produced brochures, and a quarter (25%) have public speaker programs or provide public notices.

Only one of the HARBs has a recognition program or offers awards for excellent rehabilitation. Recognition programs are an inexpensive way to broaden the reach of the HARB, promote more awareness of the work, and generate goodwill for homeowners in regulated historic districts.

Two thirds of the HARBs have partnered with other organizations in the past year, and 68% wish to have access to more or better research about their communities. Only a third have a desire to be involved with new programs that link the local HARB to other sites or organizations.

Unlike the Historical Commissions who routinely involve themselves in advocacy efforts about the funding or preservation of historic sites or buildings, 75% of the HARBs have not done so in the last year. Because these bodies regulate historic resources, they may be reluctant to become involved with advocacy efforts.

Survey Highlights- Historical Commissions

There are 14 historical commissions in Delaware County, and 64% responded to the survey. Only one of the 14, the Delaware County Heritage Commission, has access to staff or consultants to help with issues or agenda items.

These municipal bodies are made up of local historians and activists that are appointed by local elected officials. More than half (56%) play some role in administering, reviewing, and making recommendations for an ordinance that affects demolition or alteration to historic resources.

Four of the nine commissions say that demolition is their top concern, while another 50% say that lack of community awareness is a major concern. Other top issues include development pressures as well as lack of local government support.

Only a third of the historic commissions participate in any form of training offered by the Pennsylvania Historical and Museum Commission. Only two of the nine historical commissions provide any form of training or orientation for new commission members when they are appointed. There is great interest in commission training as 86% said that was a major issue.

The historical commissions responding to the survey do not have a large or active effort to engage the public in their work. Only two commissions said they produce local history books, conduct speaker programs or tours, or place roadside signs about the history of their communities. Public engagement presents a great opportunity for these groups to participate more broadly in public history efforts.

Two-thirds of the historical commissions have awards or recognition programs. Award programs to recognize individual property owners who have done excellent work to restore or merely to maintain their historic buildings are an excellent method to increase local awareness of preservation and local history. Recognition of individuals who have gone to great lengths to help to maintain the community's character can do more than many other activities can to enhance and build positive relationships with local government and local citizens.

These municipal bodies do not often partner with other organizations. This poses a great opportunity to involve the local commission with historic sites and other organizations in their communities. Commissions could network with nearby larger projects such as themed tours that would include aspects of their historic districts or individual landmark buildings to provide context for public history projects. 71% of the historical commissions would like to be involved in new programs that link with other sites or organizations.

Virtually all of the commissions were in some way involved in advocating for an historic site or building in their community. This is an appropriate role for any historical commission to take. In the last year, all but one commission visited or had a meeting with an elected official, others called or wrote letters. About a third (38%) testified at a public hearing on an issue that affected an historic building.

Highlights From One-On-One Interviews

Heritage Consulting Inc. undertook 40 one-on-one interviews with Delaware County historical organizations in all categories including Historic Architectural Review Boards, Historical Commissions, preservation organizations, historic sites, and historical societies to get a wide range of opinions. In some cases, the interviews were with several people from an organization, giving a richer view of the capacities and current issues facing historic organizations within the county. Asking specific questions that followed-up on the survey questions added greatly to the assessment of the organizational capacities of these varied organizations. This section provides more detailed information gleaned from those interviews.

Of the 40 organizations interviewed, most had made the “generational shift” from Boards dominated by individuals in their 70s and 80s (often called the Greatest Generation) to those in their 50s and 60s (universally known as Baby Boomers). The vast majority of the organizations had been able to recruit “younger” board members, those in their 50s and 60s most often. This is a healthy part of an organization’s evolution and indicates that the new group has taken hold of the organization with the intent of being active stewards and possibly undertaking new programming.

Budgeting

A budget states the active intentions of the organization and not a passive response to opportunities or threats presented each year. A formal budget implies that the organization intends to judge its fundraising efforts at the end of the year by reporting a surplus or deficit. Right now, 45% of the volunteer-run organizations have no idea how their fundraising efforts are doing compared to last year’s or the year’s before because they have no records other than bank statements.

While the lack of a formal budget may give the impression that most volunteer-run organizations are living a hand to mouth existence, this is generally not the case. Eighteen organizations, 38%, had formal endowments held by investment houses, board designated funds that act like endowments, or working capital often held in CDs .

The interviews revealed that 11 of the 39 volunteer-run sites have working capital in investment accounts, ranging from \$10,000 to more than \$150,000. These sums seem to be designated by the board to be used for extraordinary expenses such as capital repairs and improvements at historic sites. These sums appear to have come from prudent long-term management by accumulating money from reserves rather than from bequests or traditional capital campaigns. Some smaller volunteer-run organizations had \$10,000 in a Certificate of Deposit, but that was a significant sum for them and more assets than most nonprofit organizations.

This is a very high percentage of organizations with endowments or working capital, and far beyond what other Philadelphia area historic sites can claim.³⁴ For the volunteer-run organizations, this is especially good news because having working capital allows the organization to take some risks and exploit opportunities.

Discussions about budgets also confirmed that the volunteer-run organizations have not been able to obtain grants from public or private sources. Most foundation and government grant funders often require that paid staff administer any funds they provide. The vast majority of the volunteer-run organizations raise operating funds from memberships, general donations, admissions, events, and sponsorship, which are traditional sources. The Ethel Sergeant Clark Smith Foundation gave money to four organizations.

³⁴ A 2002 study of the IRS 990 tax returns of the 275 historic sites in Philadelphia and the surrounding four counties indicated that less than 10% of these organizations had an endowment of any size. See Donna Ann Harris, *New Solutions for House Museums: Ensuring the Long-Term Preservation of America’s Historic Houses*, Lanham MD: AltaMira Press, 2007, 11.

Historic Sites Stewardship

Answers to follow up questions about stewardship of historic sites indicated that there were deferred maintenance needs at all sites despite the fact that these sites appeared to be well maintained to the average visitor and 77% of the survey respondents say their sites are well maintained.

Interviews revealed that most organizations that manage municipally-owned historic sites have shared management relationships. The municipalities will pay for certain costs such as heat, light, alarm service, and lawn maintenance. The nonprofit organization will pay for the insurance on furnishings it owns and undertake discrete repairs or restoration depending on its ability to raise funds. Some of the sites have no role in maintenance or restoration and only support opening the house for tours.

There is no specific trend or typical arrangement. These agreements between the municipalities and the nonprofit organizations have grown up as “handshakes” over time. Very few organizations have written agreements with the owners of the sites setting out responsibilities of each party. A formal agreement is essential, if only to clarify the relationship and responsibilities for the nonprofit organization.

Interpretation

The historic sites overwhelmingly depend on the guided tour for their primary form of interpretation. This places a great degree of responsibility on the individual docent/guide/presenter. Many sites lack formal training and interpretive resources for their guides. Given from the surveys that 74% of the historical organizations do not have interpretive plans, there is an opportunity for hosting guide training and interpretive development. The general quality of individual site interpretation is unknown. No volunteer-run sites conduct any kind of visitor assessment or evaluation based on the interviews, so no one knows how the public views their interpretive offerings.

School programs

Additional questions about the organization’s relationship with the local school system were asked. Most organizations were frustrated with their relationships because so few have ongoing educational programs for school children. Most cited the cost for busses or the emphasis on teaching reading and math rather than history or social studies as being reasons why school districts were not making as many field trips to their sites. Some organizations have partially solved this problem by creating “travel trunks” that they take to classrooms to present their materials to students.

The need to substantially rework the school programs at historic sites to meet the Pennsylvania Standards for History is a considerable expense of both time and effort. Each historic site, especially the volunteer-run sites, will have to develop an entirely new curriculum guide, lesson plans, and activity sheets that meet current educational standards to draw teachers for effective lessons at their historic sites. For an average of 246 visits per year by school children at the volunteer-run site, this might be a great deal to ask.

Even with these new educational programs, a school may still decline to permit students to come because of bus costs, standardized testing requirements, and general apathy. From interviews it was discovered that the staffed sites are seeing definite evidence of the decline in visitation due to bus costs, and several mentioned this is something they expect to get worse not better in the coming year.

Relationships with both teachers and administrators are the best way to encourage school visits by teachers.³⁵ However, these visits often include the entire 4th grade. Interviews revealed that schools would bring 80 children for two hours in the spring. To accommodate these visits, historic sites need to have multiple volunteers on hand to provide “hands-on” experiences as well as tours inside the house and around the grounds. Many sites would have difficulty accommodating this number of school children because of lack of volunteer guides available during the day. Considerable thought must go into preparing the required curriculum materials for what seems to be for a highly uncertain payoff.

More than three quarters of historic sites participate in the Delaware County Historical Society’s Passport to History program. This school enrichment program, Passport to History, is the only countywide effort to promote visitation to historic sites, and this program is well regarded by historic sites. Students receive small booklets, the passports, identifying all the participating historic sites. Over the summer months, students are encouraged to visit historic sites in the county with their parents to collect stamps in their passport. Students are recognized in some school districts at the start of the school year for their visits to local historic places. Universally, historic sites are enthusiastic about this program. This program is fully funded for the coming school year.

Visitation statistics

Interviews revealed that visitation numbers, whether for adults or children, might be grossly under reported by most historic sites. Most volunteer-run sites are casual about keeping visitor records and rely on guest sign-in books as their main means of tracking visitation. Other groups merely estimate their visitation. This is an area of great potential opportunity because understanding who visits and when can help sites assign volunteers when visitors are expected.

Interviews also revealed that most sites are open just one weekend day for four or five hours, and it is not always the same day, Saturday or Sunday. Most volunteer-run sites are not open in the winter (after Christmas through April). There are many opportunities here to expand hours if there are jointly hosted events or tours that encourage a set of sites to be open when visitors want to come (which is on the weekend). Most now provide access when they have volunteers to staff the site; however, if they wish to engage more visitors, they must be open more often. All the staffed sites are open regular hours Monday to Sunday. Open hours are listed on websites 90% of the time.

³⁵ Interviews were conducted with Patricia Theodore (President of Colonial Pennsylvania Plantation and Employee of Rose Tree Media School District), Noah Lewis (Historic Interpreter who works with many Delaware County School Districts), Sandra Schaal (Social Studies Coordinator for Marple Newtown School District), Amy Wolfe (Haverford Historical Society & Haverford School District), and Ivan Jurin (Delaware County Intermediate Unit Social Studies Specialist).

Advocacy efforts

About half of the organizations engage in some form of advocacy, mostly in the form of visits or letters to elected officials. This was especially true of historical societies because these board members are the ones most often concerned about threatened properties in their municipalities. Scores of past preservation battles were cited in their remarks as well as concerns about threatened or underutilized historic buildings in their communities.

Volunteer Recruitment

There was general lack of knowledge about how to recruit volunteers whether to serve on the Board or help with programming. Many reasons were given as to why volunteer recruitment is so difficult: sociological change, people are busy, do not value volunteerism, dual income families, and an aging volunteer corps. Volunteerism has radically changed during the last 10 years. The historical organizations can improve the way they manage and treat volunteers to make the work more engaging and fun. Interviews also revealed that there was little effort made to thank volunteers who participate in projects. Training is necessary on how to recruit, retain, and reward volunteers.

There was a great deal of misunderstanding about the availability of grants. Volunteer-run organizations were generally unaware that they might not qualify for grants because of the lack of paid staff.

Collaborations

Finally, while there was general interest in cooperation and collaboration expressed in interviews, there was little evidence of any organized collaborative effort. There is little current collaboration between various historical organizations and the Delaware County Historical Society. Personal relationships between volunteers at various historic sites seem to be the driving source of any collaboration rather than thorough formal networks. Rich Paul has been gathering an informal group together for more than a year in an effort to spark more collaboration, and this type of collaboration should be encouraged.

There are nine organizations that are considering starting a nonprofit to help save a building or start a preservation organization or historical society. The organizers of these new historic organizations are all well-intentioned individuals, who are continuing the time-tested method of saving historic buildings, by buying them or leasing them in order to save them from deterioration or destruction. Others feel that a watchdog group is necessary to promote preservation awareness in their town. These emerging organizations need assistance. For those wishing to save historic sites, they must understand at the outset the uncertain road ahead in setting aside these structures as museums based on the experience of their peers.

Focus Group Report

Heritage Consulting Inc., a consultant to the Delaware County Planning Department, conducted seven focus groups from November 16-19, 2009 as part of the Delaware County Public History Feasibility Study and Implementation Plan

The purpose of the focus group discussion is to gather information from stakeholders about heritage development and public history in Delaware County. The focus groups were another method to reach out to individuals and organizations in order to learn more about their needs, observations, and interests. There were discussions regarding some early action items that came up during the interviews and about better means of cooperating and coordinating efforts. The same questions (see below) were asked at each of the seven focus groups. The responses have been recorded anonymously and are available at the Delaware County Planning Department.

Eighty people were invited to the focus groups, and 40 people actually participated. About half of the people who participated in the one-on-one interviews attended the focus groups.

All focus group participants were asked the following questions:

1. Based on what you already know about the Public History Feasibility Study and Implementation Plan, what are the most important things that you think can come out of this Project for the county?
2. What priority would you rank these services or activities? What is most important to you or your organization?
3. How do you think these services or activities should be carried forward? (Is there an already existing organization that can help?)
4. What role would you or your organization be willing to play to advance these ideas?
5. Would you/your organization be willing to pay a small fee or a membership to have these services/activities provided for you? How much would that be?
6. Is there anything else anyone would like to add?

Major Findings

There were a multitude of ideas for technical assistance and training, representing the broad swath of experience levels and interests of the volunteer and staffed organizations that participated in the focus groups. Most of these topics were suggested by the volunteer-led organizations and therefore deal with fundamental organizational capacity issues or basic historic site management topics.

The training needs are organized and listed by topic in the table below. For each topic, the programs are listed first by the programs that participants voiced interest in and then by programs that are recommended by Heritage Consulting, Inc., based upon the statistical analysis of the survey results.

Training events and workshops

<i>Topic</i>	<i>Programs Requested by Focus Group Participants</i>	<i>Programs Recommended by the Consultants</i>
<i>Fundraising</i>	• Workshops on grant-writing • Workshops on funding and fundraising • Governmental funding programs information • HUD program information	• Fundraising realities for volunteer run organizations • Growing your membership • Diversifying revenue sources • Sponsorship solicitation • Creating new fundraising events
<i>Volunteers and Board Development</i>	• Training for volunteer training and retention • Volunteer recruitment, especially for the younger volunteers • Workshops on board development and recruitment	• Writing volunteer job descriptions • Thanking volunteers
<i>Publicity, Outreach and Advertising</i>	• Increasing public awareness of sites • Workshops for press officers; information on how to contact different newspapers • Web resources, social media training • Website design	• Difference between PR and Advertising • Getting started with web based newsletters
<i>Nonprofit Management</i>	• Accounting resources; software, accountants, filing IRS form 990 • Legal resources; copyright, incorporation, nonprofit tax exempt status applications assistance • Insurance assistance • List of best practices for historical organizations • Speakers bureau in Delaware County • Mailing lists • List of all the different local groups • Association law • Organizational development assistance or training	• Creating a formal budget, chart of accounts, and financial statements • Strategic planning • Mission and vision statements • Investing reserves • Planning joint projects

<i>Collections Management</i>	• Archival help and accessioning help for organizations with collections • Cataloguing standardization • Environmental safeguards (collection management) • Security • Inventory help for those with collections	• Collections care and storage • Making the case to local government about collections storage • Creating a collections policy
<i>Historic Buildings and Historic Sites</i>	• Historic structure preservation assistance • Guide (docent) training	• Making a site's story more engaging • Rethinking a site's interpretation for the 21st century • Planning group interpretive projects • Interpretive plans • Creating events/activities to bring in new audiences • Converting visitors into members
<i>Historic Preservation</i>	• Assistance drafting preservation ordinances • A reference bank of developers who have done quality preservation work • How to restore a historic home, where to begin, and what resources to find • List of restoration crafts people, architects, and trades people • Bricks and mortar assistance and advice	• Historic Preservation 101 • How to pass a local preservation ordinance • Updating historic sites surveys • Starting awards programs • Creating a cyclical maintenance plan
<i>Living History</i>	• Workshops for living history • Workshops on 18th century skills • Library of living history skills/trades to borrow • List of historical re-enactors	• Developing lesson plans for school programs • Developing successful relationships with local schools • Linking stories to other sites
<i>Advocacy</i>	• Convincing local government to support you • Working with local officials to advocate for sites	• Lobbying 101 for nonprofit organizations

Focus group participants uniformly wish to network among their peers in the other historical organizations. They want frequent meetings with thoughtful speakers and opportunities to get to know others that are working at similar organizations. While these networking sessions need not be formal, they do need coordination and a facilitator to make sure they are organized and are a quality experience for each participant. Group facilitation methods could be employed to assure that fruitful networking occurs. Participants also want to talk about their successes in a similar kind of forum.

The format that was discussed most often and with great affection was the “presidents club” created by Merv Harris when he was president of the Delaware County Historical Society in the late 1990s. This format included quarterly meetings held at different historic sites with talks by outside speakers and

included opportunities for networking. These meetings seem to still be held in high regard because they were exclusive (being limited to presidents or one other representative per organization) and provided useful content. No dues were charged and these were held on Sunday afternoons most often during the winter months when sites were closed.

Another format that seems to be of interest was a series of peer networking events for board members or others interested in local history. These events would be open to all. Several people noted that the social element of meeting people and sharing ideas was also necessary to any type of educational event. The fun aspect of being part of an organization can often be overlooked by volunteers because they realize there is more to do than there are people or hours in the day to complete the work.

Collaboration Needs

Shared calendar

The need for a shared calendar came up at almost all of the focus groups. There were variations on what was required. Some participants sought a public calendar where groups could post their events. Others were looking for a private calendar to be used as a means of viewing overlapping events. The Heritage Commission email list does not have a calendar function and only sends out email notices of events.

Website

There were many calls for a countywide website or links to already existing websites. There are several history-related websites about the county already in existence that have no affiliation with County Government or the Delaware County Historical Society.

Focus group participants suggested a content-rich website that would link to other sites in the county, have a calendar function, permit organizations to upload appropriate information, and serve as a clearinghouse. There was no specific function for the website other than as a facilitation vehicle for Delaware County news and information about individual sites. This site was not viewed as being a tourist vehicle to provide information on opening hours; rather most felt it was more an internal means to collect and share information.

Redundant Systems Needed

One stumbling block to the wholesale use of websites, shared calendars, or listserves is the significant minority of individuals without email addresses. A supplementary and paper-based system is still needed to communicate with those who do not have access to the internet.

Sharing Common Needs and Answering Questions

Focus group participants also wanted to share ideas or questions with each other, and several methods were discussed including a website, listserve, and a “constant contact” periodical newsletter or the current Heritage Commission email list. Participants were looking for answers to common issues such as referrals for good preservation trades people, ideas for volunteer recruitment, or names of people with 18th century skills (iron makers, butter churners, etc.). At the baseline, they wanted a directory or list of all the other historic organizations in the county with contact information.

Listserve

Chris Driscoll, a volunteer leader with the Newtown Square Historic and Preservation Society, took the initiative and offered to create a Google Groups listserve called the Delaware County History and Preservation Network for all of the historic organizations in the county. This listserve went live in December 2009. For additional information on the listserve, see page 88 in the Recommendations Chapter.

The listserve is completely independent of and has no affiliation with Delaware County. This is an unmediated listserve with some baseline rules. The list organizers are Chris Driscoll and Donna Ann Harris. If you wish to join the listserve (it is open to anyone), please send an email to: info@dchpn.org.

Leadership

The question, “Who should lead this effort?” was asked at every focus group. The responses came back mostly in the form of questions, essentially asking about or suggesting already-existing organizations as likely suspects.

The liveliest part of every focus group was a discussion of who or what group was the most likely one to take leadership of any cooperative or joint effort. The following organizations were mentioned: The Delaware County Planning Department, the Delaware County Heritage Commission, the Delaware County Historical Society, and the Delaware County Community College. No individual was mentioned save for Rich Paul, the current chairperson of the Heritage Commission. No local organization was held up as a likely leader.

Both the Delaware County Planning Department and the Heritage Commission were ultimately dismissed as possible leaders because although their missions overlapped with the proposed leadership entity, they were fundamentally different than the proposed leadership entity. The Delaware County Community College was also rejected due to its main function as a school rather than as a leadership vehicle.

Focus group participants spent a great deal of time discussing the merits of using the Delaware County Historical Society; however, this organization was not a perfect fit.

Ultimately, there was no “perfect” candidate among these groups, and participants realized that a new organization, a collaboration to include all the existing countywide entities and a selection of other local historical organizations, would probably be necessary to carry forth any joint effort.

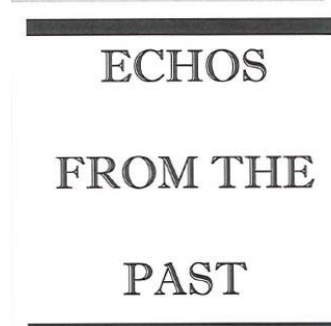
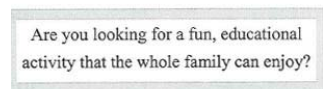
Legacy of Previous Initiatives

Both the one-on-one interviews and the focus groups revealed that there have been at least five other attempts to create a common organization to assist the historical organizations in the county to jointly market their sites or develop joint programming. The legacy of previous initiatives that eventually failed is daunting to overcome.

The lack of a likely leadership organization made some focus group members unsettled possibly because they felt that this work would fall to them to undertake. These individuals noted that they already had too much to do and were unwilling to take on any new endeavors. Many feared an open-ended, indefinite commitment. Other focus group participants felt that the creation of a new cooperative organization would be difficult or impossible given past initiatives. Still others seemed excited about a new umbrella organization and advocated strongly for a new entity. The variety of opinions was likely based on the focus group participant’s age and experience with the previous initiatives. No one felt that working cooperatively and/or collaboratively was a bad idea to promote. Instead most focus group participants were stuck on mechanics of how it might work rather than the outcome, the creation of an entity to help and coordinate the many historical organizations in the county.

The Vision

Several key volunteers noted the need for an overall vision for any new cooperative organization to lead any joint effort. These leaders, already respected by their peers, were highly concerned that without a clear vision of what the future might be, the effort could get off to a weak start. This component, to create an initial mission and vision statement to provide clarity, can be addressed as part of the preparation of



the Implementation Plan. The newly established listserve could be used to gather thoughts and ideas from a broad group of people to feed into a mission statement.

An Interest in Collaborating

There was overriding interest in collaborating and doing projects together, even on the smallest scale, such as linking historic sites together on websites or producing a joint brochure. The scale of the projects mentioned were very small, as if the volunteers working at the sites already acknowledge how much time and effort it would take to even produce a joint brochure, for example.

There has been some effort in the past for sites to work together on an informal basis. The 1994 Mills Project is one of the more spectacular examples. It brought together many sites and organizations interpreting

early industry in the county.

Many volunteers know and like each other and share their skills with other sites (especially 18th century life skills). However, this informal method of collaboration affects just a small subset of the 80 historical organizations. The vast majority of the historic sites, as seen in the interviews, are solely focused on their own sites, and they rarely make an effort to cooperate with other sites.

Rich Paul of the Thomas Massey House has been meeting informally with a group of nearby historic sites, and they have begun to develop a collaborative program. They have named their effort ECHO (Eastern Coalition of Historical Organizations) and are planning a joint brochure. This is an excellent first step and should be emulated or expanded into other parts of the county. This might be an excellent pilot project to expand.



1696 Thomas Massey House, Marple

Other needs

Formalize and create better working relationships with the Brandywine Conference and Visitors Bureau

Several group members expressed disappointment about their relationships with the Brandywine Conference and Visitors Bureau (CVB). Some organizations paid membership fees while others received free memberships. Some saw value in being members, but most did not. Some participants complained about the quality of the information on the website and in the CVB publications. Most participants wished that the CVB could play a more central role in bringing visitors to their sites, but none had thought through the implications for this service.

Group purchasing

Several focus group participants saw the need to create a purchasing coop for commodities or services needed by historical organizations. These could vary from accountants to toilet paper; acid free tissue to skilled roofers. This might be an initial foray into joint projects that would not commit organizations for long-term relationships but where bulk buying could create real price benefits for all participating groups. This experience working in a cooperative manner could help organizations begin to consider joint staffing over time.

Implementation Plan

Inclusion of Local Historic Resources in Local School Curriculum

Part of the research for the Delaware County Public History Feasibility Study and Implementation Plan, included “interviews with selected school districts and the Delaware County Intermediate Unit to gather information on curriculum opportunities for use of outside resources within the County, policies on classroom travel, and teacher involvement within the community. “

The purpose of this chapter is to help historic sites understand the issues that school districts and teachers face when considering field trips to historic sites. This chapter also provides suggestions about how to begin a fruitful conversation with the nearby schools and school district personnel to begin to create lesson plans that offer high quality and engaging school programming at their sites.

Interviews conducted

A diverse group of five professionals involved with public education and history in Delaware County were interviewed to illuminate the issues around the declining number of school visits to historic sites. The interviews included:

- Patricia Theodore (President of Colonial Pennsylvania Plantation and Employee of Rose Tree Media School District)
- Noah Lewis (Historic interpreter who works with many Delaware County School Districts)
- Sandra Schaal (Social Studies Coordinator for Marple Newtown School District)
- Amy Wolfe (Haverford Historical Society and teacher at Haverford School District) and
- Ivan Jurin (Delaware County Intermediate Unit Social Studies Specialist).

How school districts are organized in Delaware County

In Delaware County there is a decentralized model of school district administration. With 15 school districts within the county, each school district has its own superintendent, curriculum staff, principals and teachers. Each school district adopts its own curricula, which vary from district to district, subject to overarching state mandates. There is a county-level regional services entity, the Delaware County Intermediate Unit (DCIU), which provides technical assistance to districts. In total, there are 92,000 school-aged students in Delaware County and 6,000 teachers.³⁶ This decentralized model of administration means that in order to facilitate coordination and the inclusion of local history in classroom instruction, local historic sites must work individually with each local school district.

³⁶ www.dciu.org.

Impact of State Mandates on Local School District History Curricula

While district administration may be decentralized, there are a number of higher government regulations that affect local district history curricula. Academic performance has been increasingly stressed in local school districts as a result of state and national mandates. With standardized assessment/testing, districts are pressured to demonstrate achievement. As a consequence of the Pennsylvania System of School Assessment (PSSA) enacted in 1999 and the federal No Child Left Behind Act of 2002, local school districts in Pennsylvania are required to measure proficiency in specific subject areas. The PSSA tests students in grades three, five, and eight in reading and math. In grades five, eight, and eleven, the PSSA tests writing. In grades four, eight, and eleven, students are assessed in science. History and social studies are not assessed by the PSSA at all, in any grade level.³⁷

Many districts emphasize these assessed subjects to demonstrate academic effectiveness at the expense or de-emphasis of history and social studies. For example, the Marple Newtown Elementary Curriculum Guide includes five specific content areas for language arts but just one for social studies in grade four.³⁸ The emphasis of these areas (reading, math, science) is likely found in other districts as well. This pressure on performance/testing is state-mandated and beyond the control of historic sites and organizations.

Pennsylvania Standards for History

Pennsylvania has state curriculum standards for the teaching of history. The Pennsylvania Standards for History, passed in 2002, apply to all local districts and guide classroom instruction. These standards emphasize four content areas: Historical analysis and skills development, Pennsylvania History, United States History, and World History.³⁹

There is discussion underway at the State Education Department about the need to increase history knowledge for students in the future, but these changes have not yet been promulgated.

Educators will expect programs at historic sites that touch these four content areas and meet the Pennsylvania Standards. In order to meet these content standards, historic organizations must adapt their educational programming for school children. Sixty-one percent of historic sites and organizations were unaware of these state standards and only 11% responded that their existing programming met the state standards.

It is important to note that a typical elementary school teacher has to cover many subject areas including science, language arts, math, and social studies. An elementary school teacher may have particular training and interest in reading or science and less of a familiarity with social studies and history.

³⁷http://www.portal.state.pa.us/portal/server.pt/community/pennsylvania_system_of_school_assessment_%28pssa%29/8757

³⁸ *Elementary Curriculum Guide 2006-7* Marple Newtown School District, 15-6.

³⁹ *Academic Standards for History* by the Pennsylvania Department of Education, xxiii.

Expecting teachers to supply their own lesson plans for visits to historic sites is unrealistic, especially for enrichment activities such as field trips.

Current situation at historic sites

Historical organization and site visits were conducted first in order to understand what issues they see hindering school participation. At historic organizations, some misconceptions and false impressions about local schools were found.

The concern about the inclusion of local historic resources in primary and secondary education repeatedly surfaced in survey responses and historic site visits. Many sites noted the declining visitation and participation from local schools. Sixty-one percent of survey respondents expressed an interest in involving local schools at their historic sites, but only 31% do currently. Visitation by school groups to all sites was 48,723 in 2008, 49,317 in 2007, and 50,523 in 2006. School field trips to staffed sites are driving the visitation: 46,000 in 2008, 45,000 in 2007, and 44,000 in 2006. Some visitation statistics reflect out-of-county school groups and field trips.



School Group Visiting Morton, Morton House
Norwood

Volunteer-run sites saw visitation grow from approximately 4400 to 4900 in the three years from 2006 to 2008. The numbers of school visitors at these sites varied from zero to 1000 a year, with the average of 246 a year. With 4900 visitors, volunteer-run sites are penetrating just five percent of the total student population in Delaware County.⁴⁰

Historic sites noted the following concerns: declining visitation by school students; constraints from standardized tests that limit field trips; the added expense of busing students to sites; finite number of field trips, and teacher apathy. Only one site director (and a former teacher) said that he believed that schools were not visiting because the sites had nothing to offer them given educational expectations today. These issues formed a set of core concerns that were probed and evaluated during the targeted interviews with education professionals.

After interviewing local school district personnel, curriculum specialists, historic sites, and organizations the issues and direct challenges have become clear. The major findings are below.

⁴⁰ Ibid.

Findings

Cost of busses

Interviewees all shared an understanding that many local school districts face daunting financial pressures. Field trips are an added expense to classroom instruction and are considered enrichment to in-class activities. Many districts have enacted limitations to curb expenses and limit field trips because of the cost of busses. Interviews revealed that the staffed sites are seeing definite evidence of the decline in visitation due to bus costs, and several interviewees mentioned this is something they expect to get worse, not better, in the coming year. Sandra Schaal confirmed that many districts had decreased funding available for field trips. For example, one local district limited each classroom to one content-related field trip per year, and free admission was a major factor in deciding where to go.

Some districts and schools have tapped additional sources of funding to maintain field trips. Parent-teacher organizations have been able to raise some additional funds to maintain these trips, but these vary in strength school-by-school. Some schools have been able to secure supplemental grant funding for specific field trips. Most schools go without school trips.

Districts have also cut costs in less obvious ways. Districts now add more students per available field trip. In the past, one class at a time would typically visit a site. Now, districts schedule the entire grade for the field trip. This can stress the capacity of interpretive programs with 80 students visiting sites designed to accommodate 20 students at a time.

Additionally, at sites that offer a variety of interpretive programs with different price-points, school districts have selected lower-cost programs in recent years. Patricia Theodore said that many school districts had chosen less-expensive programs at Colonial Pennsylvania Plantation that included less interpretation and activities for students so that the school district could afford the visit for all the fourth graders at one school at one time.

Lesson plans are a must

Historic sites and organizations can respond to some of the realities faced by teachers by preparing pre-made lesson plans and activity sheets in consultation with local teachers to meet these educational standards. Local historic sites and organizations have the raw historical materials that can meet these state history standards to make it easier for teachers to plan and participate in these trips. Ivan Jurin, stressed the importance of available lesson plans to include the use of local historic resources. He mentioned the National Parks Service website *Teaching with Historic Places* as a model resource.⁴¹ This website presents sample engaging lesson plans that use historic sites as a focus.

The need to substantially rework the school programs at historic sites to meet the Pennsylvania Standards for History is a considerable expense of both time and effort. Each historic site, especially the volunteer-run sites, will have to develop an entirely new curriculum guide, lesson plans, and activity sheets that

⁴¹ www.nps.gov/nr/twhp.



Federal School, Haverford

meet current educational standards to draw teachers for effective lessons to the historic sites. For an average of only 246 visits per year by school children at the volunteer-run site this might be a great deal to ask. Considerable thought must go into preparing the required curriculum materials for what seems to be for a highly uncertain payoff.

Content of the presentation must change

The style of interpretation for field trips has also fundamentally changed. Educators are no longer interested in passive lectures by docents at historic sites for their students. Educators now want experiences that are factual

and engaging and that use the Pennsylvania Standards for History and reading, math, and science as jumping off points for school tours to historic sites. More hands-on activities will be needed as well as first person experiences. Sandra Schaal and Noah Lewis emphasized active learning as a crucial element to successful programming. Amy Wolfe described the importance of engaging programming for students. The Colonial Living program at the Haverford Township Historical Society is a model and a rarity because it has been around for more than 40 years. It includes many hands-on activities and dedicated school district staff to facilitate the program.

A partial solution

The financial pressures facing schools are real impediments and will require historic sites and organizations to respond with lower-cost or free programs. Some sites already make classroom visits with travel trunks of local artifacts and materials or in-class interpretation in place of site visits. This may be one additional outreach method that deserves to be explored, but again these visits must be centered on the curriculum and include lesson plans and activity sheets to justify the time spent away from regular, test based instruction.

Relationships are key

Interviews showed how important personal relationships are both in arranging field trips and including local historical resources in instruction. Respondents mentioned that an interested principal, teacher, or even an engaged parent was the gateway to begin collaboration between a school and an historic site. To be successful, historic sites must find a teacher or principal who has an interest in local history or perhaps is a member of a local site or historical society and can help begin the process of local history inclusion. Sandra Schaal described one recent example of a teacher and the local school district curriculum coordinator who worked together with site volunteers to design a lesson plan and activities for a field trip program. Stories like these were typical from interviewees.

Recommendations

What historic sites can do to increase school group visitation

The following list contains recommended actions that historic sites and organizations in Delaware County can take to respond to the many issues that must be overcome to entice teachers to visit historic sites.

- Recognize that a culture of academic assessment and demonstrated performance as a consequence of the PSSA has elevated reading, math, and science as a primary focus of instruction at the elementary level. History is not tested. Programs that incorporate reading, math, and science will likely be more appealing to potential districts for participation. Historic organizations would be wise to incorporate some of these content areas into their programming for students.
- The decentralized model of administration in Delaware County requires that organizations work on a district-by-district and even school-by-school basis. There is no central administrative center to mandate the inclusion of local historic resources. Sites will have to make the case to the district administration that historic sites should be part of the curriculum and school visits to sites are an essential part of learning local history.
- Funding has emerged as a challenge for many districts, and they will likely be attracted to free or lower-cost activities. Sites should focus on schools that can walk to their sites first because no busses (and their attendant costs) are needed. Additionally sites might explore the substitution of in-classroom visits and demonstrations in place of site-visits.⁴²
- Historic sites and organizations must develop engaging and factually-based programs for students that meet the Pennsylvania Standards for History. This includes the preparation of lesson plans and activities. Historic organizations should make it “easy” for teachers to come to their sites by providing these essential tools for learning in advance of a visit and as a follow-up.
- Personal relationships are a crucial part of marketing any historic site for school visits. Organizations should begin the discussion with teachers, administrators, and parents that are members of their organizations.

There are many opportunities to promote the use of local history in Delaware County schools, but there are substantial issues to overcome. The purpose of this chapter is to help historic sites begin a fruitful conversation with the nearby schools and school district personnel to begin to create lesson plans that offer high quality and engaging school programming at their sites.

⁴² These could include travel trunks with local artifacts, in-class presentation, and interpretation.

Upgrade interpretation and new stories for Delaware County

Throughout America, historic sites and places are facing unprecedented interpretive challenges. Many historic sites and public history organizations find that their educational offerings, be they tours, special events, festivals, or hands-on family activities no longer energize visitors as they did in the past. They also find their interpretive programming fails to reach new audiences beyond the traditional local family on an outing for the weekend.

This lack of appeal is reflected in declining attendance, declining membership, and declining participation rates. Visitation to all historic sites nationwide has been on a very long, slow decline since the 1980s based on analysis from the National Trust for Historic Preservation.⁴³

An article in the spring 2005 issue of *Forum Journal*, the professional journal of the National Trust for Historic Preservation, included an important article entitled “Why is Historic Site Visitation Down?” by Carolyn Bracket. She gave three basic reasons for the decline in travel to historic sites: The effect of national events, a plethora of choices, and changes in travel patterns.⁴⁴

James Vaughan, Vice President for Stewardship of Historic Sites at the National Trust, weighed in on the decline in travel to historic sites. He made these remarks at a talk on February 1, 2006 given for the Heritage Philadelphia Program, a program of The Pew Charitable Trusts.

Mr. Vaughan said “I could literally spend the whole night giving you headline quotes about declining attendance at museums.... If you look at their attendance patterns, one thing is clear; that is, that the attendance has been steadily declining, slowly but surely, for more than 20 years at all of these sites.” He remarked that Williamsburg, Mount Vernon, and Sturbridge Village where visitation has declined in recent years were among “the biggest and best known historic sites in America. They have the biggest marketing budgets, the biggest development staffs. They have the most powerful and best connected boards, but they're still not financially sustainable.”⁴⁵

One provocative article that appeared in both *History News* and *Forum Journal* in 2007 by John and Anita Durel called “A Golden Age for Historic Properties” calls for historic sites to change their definition of success from visitation numbers to engagement by local residents through membership and event attendance.⁴⁶ This article explains that the heritage tourism model is outdated for historic sites, and the future sustainability for sites must be tied to the surrounding community rather than chasing after out of town visitors. This article is available for download at <http://www.aaslh.org/documents/GoldenAgeHNSummer07.pdf>.

⁴³ James P. Vaughan, “Historic Houses in the 21st Century: Preserving Historic Houses Today,” a talk presented on 1 February 2006 at Heritage Philadelphia Program meeting, transcript in author’s possession.

⁴⁴ Carolyn Bracket, “Why is Historic Site Visitation Down?” National Trust for Historic Preservation, *Forum Journal*, spring 2005, 14. The events she mentioned were 9/11, the rise of video game and the internet and short duration trips as opposed to two week car trips.

⁴⁵ Vaughan.

⁴⁶ John and Anita Durel, “A Golden Age for Historic Properties,” *History News*, summer 2007, 9, available at <http://www.aaslh.org/documents/GoldenAgeHNSummer07.pdf>.

In order to re-energize visitors and reach audiences who have never visited, historic sites and public history organizations are reworking their visitor experiences, the stories they tell, and educational programming to match these changing visitor tastes and attitudes. This Project has shown that Delaware County historical organizations also face these challenges.

Existing Conditions

Historical Background

Delaware County has a rich history. Over the course of its more than 400 year history, Delaware County has been the scene of important American events, social experiments, and movements in American History. A simple timeline of historic sites and markers reveals the very expansive nature of the county's history.

This rich collection of stories and places in Delaware County spans across race, class, and gender. Its cultural landscapes include urban, suburban, and rural communities. The broad historical narrative includes stories of people, commerce, residential life, and industrial growth and development. Delaware County has both the depth and breadth of history that would seem inexhaustible. These places are ripe for new storytelling and public interpretation, especially at historical societies and historic sites.

Current stories

While the timeline illustrates the richness and depth of history in Delaware County, the current stories that are presented and interpreted by most public history organizations are largely limited to the first 200 years of Delaware County's development. The historic sites currently open to the public in Delaware County were set aside in the past as house museums to honor the earliest generation of Delaware County residents. The Public History project analyzed the current interpretive offerings at these sites. The top five themes are:

- Colonial family life
- Colonial domestic architecture and building style
- Religion and Quakerism
- Agriculture, and
- The American Revolution.

All of these themes focus on the first 200 years of the county's history. More detailed results are available in the Public History project's survey and interview chapter (page 34) of this report.

Missing stories

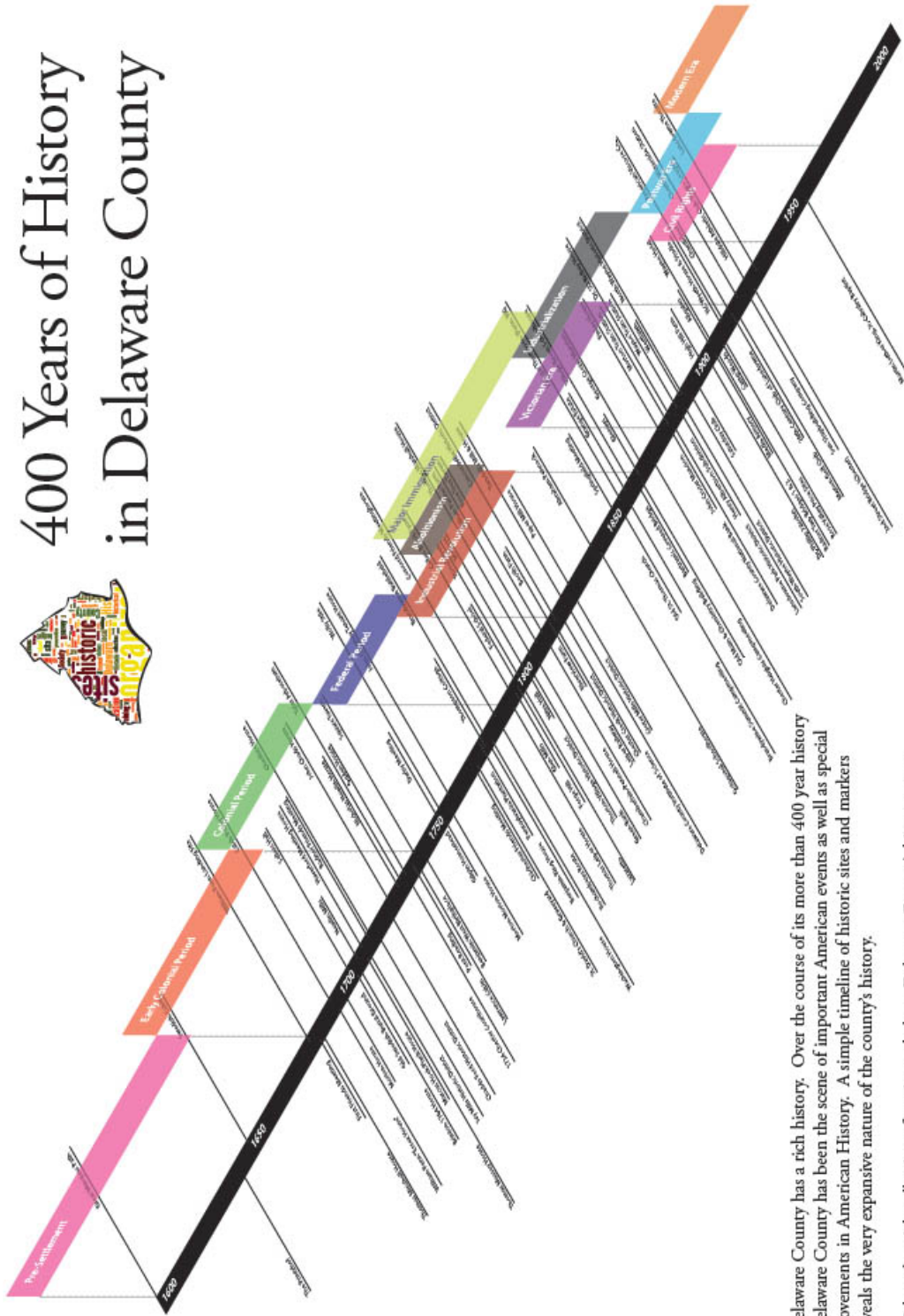
This focus on early history means that important stories of

- Industrialization,
- Abolitionism,

- the Civil War,
- the Victorian era,
- Civil Rights movement, and
- Periods of major Immigration,

The above important and exciting stories of Delaware County's history are not being widely presented or interpreted. In terms of a timeline, current interpretive activities present just 40% of the county's entire 400-year arc of history. There are many opportunities to expand current offerings and to tell new stories.

400 Years of History in Delaware County



Delaware County has a rich history. Over the course of its more than 400 year history Delaware County has been the scene of important American events as well as special movements in American History. A simple timeline of historic sites and markers reveals the very expansive nature of the county's history.

With such a rich collection of stories and places Delaware County's history spans across race, class, and gender. Its cultural landscapes include urban, suburban, and rural places. The broad narrative includes stories of commerce, residential life, and industrial growth and development. With such a rich collection of stories Delaware County has a depth and breadth of history that would seem inexhaustible.

Interpretation

What is Interpretation?

Interpretation is a crucial part of public history. According to Freeman Tilden, the author of the seminal work, *Interpreting Our Heritage*, interpretation is defined as “an educational activity which aims to reveal meanings and relationships through the use of original objects, by firsthand experience, and by illustrative media, rather than simply to communicate factual information.”⁴⁷

Historic places are interpreted using a variety of methods. Some of these include:

- Bronze plaques affixed to buildings
- Museum exhibits
- Roadside signs and blue historical markers
- Websites
- Brochures, magazines, and maps
- Festivals and special events
- Hands-on learning opportunities
- Historical reenactments
- Theater events and multimedia shows
- “First person” costumed guides⁴⁸
- Walking tours from a book
- “Third person” tour guides⁴⁹
- Self guided driving tours
- Cell phone tours
- Audio or video podcasts, or
- Narrated bus tours.



No matter the method used, the goal of interpretation is for participants to enter into a conversation with the past about the future. Interpretation, then, is an activity that provokes questions, presents relationships, and engages the visitor and participant to create a meaningful experience.⁵⁰

As a part of the Public History project, the survey and interview portion of the Study evaluated interpretive activities at existing historic sites and public history organizations. While historical research includes raw materials such as letters, maps, photographs, texts, and artifacts, it is the interpretation, the stories, that make history meaningful to the public, and makes history “come alive.” Thus interpretation must be linked to storytelling as the means to make the past real to people today.

⁴⁷ Freeman Tilden, *Interpreting Our Heritage* Chapel Hill: University of North Carolina Press, 1984 p 8.

⁴⁸ An actor in an historic costume who assumes the life of the person he/she is interpreting, and speaks only from that person’s perspective in their interaction with visitors. Often the interpreted person is a major figure in history or someone who has left an extraordinary amount of written materials about his/her life (diaries, papers etc.).

⁴⁹ A guide in contemporary clothing providing interpretation in the current day.

⁵⁰ Ibid.

What is an interpretive plan?

In order to organize and craft a coherent interpretive message, most historic sites utilize interpretive plans. An interpretive plan is a formal document that outlines the history of the site, what educational messages are conveyed and interpreted to the public, and how volunteers and staff are trained to present the site's historical message. An interpretive plan organizes historical facts and raw historical materials into thematic areas for educational purposes. These facts then are conveyed in a more cohesive message for the public on tours, in brochures, in videos, and by other means to explain the history to be imparted to the public.

Interpretive plans at staffed sites



Thomas Leiper House, Nether Providence

Nearly every staffed historic site interviewed had an interpretive plan. These sites are the tourism drivers for the county, and they have invested in interpretive plans. More than 200,000 visitors come to the eleven staffed sites in the county to participate in events, festivals, hands-on activities, or tours.⁵¹ Staffed sites understand the value of carefully constructed educational messages and stories grounded in quality research to create an engaging visitor experience. The staffed historic sites have the financial resources to have professionals who staff the interpretive activities or hire

professional expertise to create engaging interpretive experiences. In addition, these historic sites also have active evaluation programs to measure visitor satisfaction. Their

evaluation programs help them adjust and adapt their interpretive programming to match the changing tastes and needs of their visitors.

Interpretation at volunteer managed sites

The Study revealed that 74% of the volunteer-managed sites did not have interpretive plans or evaluation programs to understand visitor satisfaction and needs. As most of these sites have budgets under \$25,000 yearly, and they do not have the financial resources to hire interpretive expertise or professional staff. Compared to the staffed sites, the volunteer sites then have a strategic disadvantage in welcoming tourists and visitors.

From the site visits, interpretive reviews, and focus groups, it became clear that many of the volunteer-managed historic sites face significant interpretive challenges. At these sites, the interpretive materials were drafted, in some cases, more than 30 years ago. Both public history and interpretation methods have changed radically in the intervening years. While the stories being told at these sites may still be relevant, visitor tastes and needs have changed radically.

⁵¹ These statistics are documented in the Survey and Interview chapter of this report.

Most of the interpretation and stories presented at volunteer-managed sites are hyper-localized, focusing on local stories and residents. The stories told at the volunteer-managed sites create few or no links to broader regional or national historical events (other than the American Revolution). These sites rarely put their stories in context of the broader sweep of the historical narrative of the American experience nor stray beyond names, dates, who owned the various objects in the room, and family genealogy. In most cases, what are interpreted to visitors are dry facts that have little relevance to a 21st century family.

For example, many of the historic sites in Delaware County are homes of 17th and 18th century wealthy Quaker merchants. These houses are interpreted solely on the story of the merchant's family and Quakerism. Objects are presented at the site in the context of the relationship to the family. In presenting only these hyper-localized stories, about the merchant and his family, the site misses the opportunity to make broader links to global trade, the growth of Delaware County commerce, early government in America, and the uncertainty of life in a new nation. If the stories told focused on broader themes, links could be made for visitors to current global economic challenges, trade, and uncertainty today. These broad topics can allow a visitor to engage in a conversation with the past about the future. If these sites were able to expand and reframe the stories told about these families in terms of broader regional and national events, the site's educational value would become more valuable and relevant for visitors.

Improving Interpretation and Visitation

Turning history into stories

After many site visits throughout Delaware County public history organizations, it is clear that staff and volunteers are knowledgeable and passionate about their sites' histories. They understand their sites or places are special. They are well-versed in the facts and physical artifacts of their historic places. But to make their places meaningful, and in order to make these stories relevant for 21st century residents and visitors, organizations must craft a coherent educational message and ask fundamental questions. These include:

- What does our site illustrate best about the past?
- How can we use our unique historical resources to amplify and communicate our site's historical messages?
- How can we link our messages and our resources to develop a great tour for visitors?
- How can we present great history and connect with contemporary lives and interests?⁵²

These fundamental questions are the foundation of crafting a quality experience for the public and should be the starting point for any historical interpretive experience.

⁵² Barbara Levy, Sandra Lloyd, and Susan Schreiber. *Great Tours! Thematic Tours and Guide Training for Historic Sites*. Lanham MD: AltaMira; 2001 P. xii

Improving the interpretive experience

The Public History Feasibility Study and Implementation Plan identified engaging new audiences and new visitors as a major priority of the overall project. A majority of sites also identified interpretive needs as a significant priority in surveys. These needs include:

- New interpretive programs to link sites with one another,
- Better research for interpretation,
- Assistance to ensure a site's story is factual and engaging, and
- New interpretive programs for an historic site or organization.

In order to reach new audiences and visitors, it is crucial to upgrade the interpretive experience to connect to visitors. Many organizations already understand this crucial link.

Total visitation at staffed sites has grown from 183,576 in 2006 to 205,660 in 2008. Visitation at volunteer-managed sites is increasing. It has increased from approximately 12,000 in 2006 to 14,000 in 2008. Better stories and visitor experiences can lead to more visitors.

Recommendations later in this report include that workshops and training sessions be made available in the coming year about interpretive methods and storytelling for historic sites, which is the first step towards making a better educational experience.

Understanding visitor motivations and interests

To understand the link between interpretive quality and attendance, it is crucial to understand the motivation for visitors to participate at an event at an historic site. A recent report *Research into Action: Pathways to New Opportunities*, completed by the Greater Philadelphia Cultural Alliance (GPCA), extensively investigated the motivations for people to attend and participate in cultural activities. The report presented types of new offerings that cultural organizations can present to connect with new audiences. The GPCA has an ambitious goal to double cultural participation in the Philadelphia region by 2020, and the report identifies specific changes and opportunities for better interpretation.

The study found that a major reason participants choose to attend an event is “the desire to have high-quality experiences that are relevant to them.”⁵³ At an historic site or organization, interpretation shapes the high-quality and relevant experience for the visitor.

Historic sites do not exist in isolation. They compete with other activities for visitors, members, and audiences like never before. The growth of leisure time activities has only increased competition for these audiences. Greater Philadelphia residents and visitors go to the movies, natural parks, art exhibitions, popular music concerts, and fine arts events. Historic sites compete with these cultural activities for visitors, participants, and members.⁵⁴

⁵³ *Research into Action: Pathways to New Opportunities*. Philadelphia Cultural Alliance 2009. p. 22

⁵⁴ *Ibid* p. 19

The guided tour experience

One major challenge that historic sites face to connect to new audiences is their primary method of interpretation. Historic sites and public history organizations in Delaware County overwhelmingly (87%) depend on the guided tour as the method of interpretation and educational presentation. While many organizations utilize historic research materials developed when the site first opened, they also use the same interpretive method as they did 30 years ago. The guided tour is the only interpretive experience available at some sites.

Visitor preferences have changed. The visiting public now expects a different and more wide-ranging educational experience. Visitors now value the importance of the social element of arts and culture experiences. Additionally, visitors dislike the sometimes intimidating nature of arts and culture venues.⁵⁵ Tours and events that emphasize “don’t touch” and “be quiet” are not appealing to today’s visitors and participants.

The guided tour is declining in popularity, particularly among visitors under the age of 50. A recent major study of museum and historic site visitors conducted by Reach Museum Advisors identified the decline in appeal of the guided tour with new audiences.⁵⁶ Reach Museum Advisors is a prominent audience-research and trend firm that emphasizes audience evaluation as a major pathway to new audiences and participants.

What visitors prefer

For those sites offering only a guided tour, half of visitors are leaving unsatisfied with the method of interpretation. According to Reach Museum Advisors, fully 55% of all visitors did not want a guided tour as their interpretive experience at a history site.⁵⁷ When asked what experiences those who disliked guided tours would prefer, the Reach Museum Advisors study identified:

- Experiencing the museum at his own pace—not with a guide in tow
- More hands-on, participatory experiences—to learn by doing
- Touching, or otherwise getting closer to, original artifacts—beyond the velvet rope
- Consuming food and drink—historically appropriate or not
- Participating in special or social events, either as a guest or a host
- Extending visits to include full days, overnights, or even longer periods of time.⁵⁸

The research from Reach Museum Advisors reaffirms the findings of the Greater Philadelphia Cultural Alliance’s *Research into Action* report. These above mentioned activities are not intimidating to the visitor

⁵⁵ *Ibid* p. 22

⁵⁶ The Love-Hate Relationships with Guided Tours by Reach Museum Advisors (http://reachadvisors.typepad.com/museum_audience_insight/2009/02/the-lovehate-relationships-with-guided-tours.html)

⁵⁷ *Ibid*.

⁵⁸ *Ibid*.

and allow social participation in a relevant and engaging way. These are the experiences that visitors crave when visiting historic sites.

New opportunities to connect with visitors

Delaware County historic sites and organizations can plan new interpretive activities that reach beyond their core audiences by using one or more of the methods noted in the early portion of this chapter (Page 72). Non-traditional interpretive methods represent a new frontier for historic sites. A new neighbors social event, an art performance, a hands-on activity, or a self-guided experience can be excellent ways to interest new audiences and change the style of interpretation to meet new and evolving audience preferences.

Importance of evaluation

Reach Museum Advisors also emphasizes evaluation of historic sites and collecting audience data as crucial to keeping up with evolving preferences and trends. Visitor data and surveys reveal audience satisfaction and give real-time information that can inform future programming. Site visits and interviews revealed that most volunteer managed sites in Delaware County do not keep accurate records of visitors and have no program of feedback or evaluation to improve programming. Training workshops and programs can be presented to introduce these concepts and methods to public history organizations.

Improving the visitor experience

Research into Action: Pathways to New Opportunities identifies four key content areas to improve the visitor experience. These include:

- Relevance,
- Quality,
- Power of the personal, and
- Participation and interactivity.⁵⁹

These are important content areas to integrate into rich interpretive experiences at Delaware County historic sites. Historic sites and organizations can take steps now to integrate these findings into their existing activities.

Relevance is an important part of a quality interpretive experience. Visitors want to make a connection and a relationship between history, the past, and their own lives. This can be particularly challenging when the historical figure or topic is radically different than the visitor. The concept of relevance also has specific application when engaging new audiences including new ethnic groups, socio-economic groups, and other non-traditional visitors beyond history enthusiasts. Expanding stories to include people or

⁵⁹ *Research into Action: Pathways to New Opportunities*. Philadelphia Cultural Alliance 2009. p. 28

groups linked to the site including servants and employees, visitors, and events of social history can be a way to interest these groups.

Historic sites can also link historical differences to contemporary issues with these visitors to illustrate change and contrasts. Interpretation provides the crucial link to new audiences. By making interpretation more relevant to the individual visitor and his lifestyle, sites can tap into the “power of the personal.” Visitors are drawn to interpretive experiences that have a personal connection to them, creating a personally meaningful experience. Participants in the GPCA research overwhelmingly agreed with the statement “I take a strong interest in the arts & cultural customs and practices of my ancestors.”⁶⁰ Those historic sites that can link to cultural customs of visitors and their ancestry will be well-positioned to engage new audiences.

The quality of the visitor experience is also an important part of the interpretive experience. Visitors and new audiences are hungry for rich interpretive experiences. No longer are visitors satisfied with lengthy decorative arts tours or anecdotes about “great men” in isolation. The growth of heritage trails, thematic tours, and linked interpretive experiences reflects this new desire for stories with impact. The growth of programs that discuss servant life and working-class history have turned kitchens, servant’s quarters, and outbuildings

into some of the most visited parts of historic sites. Even Newport, Rhode Island, the summer retreat of America’s Gilded Age, has introduced a servant’s tour, and it has been met with both popular interest and scholarly praise.⁶¹ This tour allows visitors to explore servant spaces, cramped quarters, narrow hallways, and large kitchens at their own paces.

Reaching the Dream[™] in Delaware County

Delaware County has been the site of many struggles for civil rights. From its early history it has been the “first stop” for those in search of a new life. Continuing this tradition, it has also been the place of refuge for those on the network to freedom. During the 20th century Delaware County was the scene of important struggles against racial discrimination. Discover these important stories, part of a national narrative of those “reaching the dream.”

Theme Tour of Sites Connected with Civil Rights
See Appendix F

Quality also extends beyond the interpretive experience. Quality is reflected in the site’s website: accessibility to get basic information about the site, open hours, admission costs, and what a visitor can see and experience firsthand. Quality is expressed by the signage that greets a visitor and directs him to the parking area. Quality is reflected in the brochure the visitor receives as well as the hospitality extended to him before, during, and after the interpretive experience. And quality even has an impact upon the most basic of visitor amenities: a meticulously clean restroom, attractive eating facilities (if any), and a safe, well lit, parking area.

Visitors today value “participation and interactivity.” Instead of cold, scientific presentations about the past, today’s visitors want to use history as a looking-glass to understand themselves. They want to draw their own conclusions, understand their own historical relationships, and serve as their own “history detectives.” There are many ways to make interpretive experiences interactive. This can include first-

⁶⁰ Ibid.

⁶¹ *Newport Mansion Offers Tour From a Servant’s Perspective*. USAToday April 9, 2009
(http://www.usatoday.com/travel/destinations/2009-04-09-newport-mansion-tours_N.htm)

person experiences, multimedia tools, and non-traditional programming including social events, workshops, food and drink, and hands-on activities.

The visitor experience is an important way to reach new audiences as well as attract broader segments of Delaware County residents. The experience is multifaceted. A major part of this experience is interpretation. By diversifying current themes in Delaware County to include 19th and 20th century history, organizations can present broader historical experiences. To excite new visitors and participants, organizations can adapt their programs to meet changing preferences including: high quality, relevance, social connection, interactivity, and participation. The guiding principles from *Research into Action: Pathways to New Opportunities* as well as recent findings from Reach Museum Advisors will help to offer guidance and specific suggestions to improve interpretation and tap into these new audiences. One recommendation included in the recommendations chapter of this report (page 95) is training programs that can introduce these concepts and methods to Delaware County sites.

Technology and Interpretation

Recent developments in technology have opened many new opportunities for interpretation and storytelling. These include cellular phone tours, podcasts, and other portable electronic devices that can be used to bring the story of the site alive to audiences. These tools can be used at the site or online to help visitors prepare for their experiences. New technology has also opened new possibilities in interactive exhibit design.

The growth of the “podcast,” a downloadable audio or audio-video file played on a personal handheld device, such as an MP3 player, iPhone, iTouch, or other smart phone, has brought new walking tours to many cities across America. Many historical organizations and societies have used podcasts and historic walking podcasts to unlock a new level of interpretation and access for new audiences. Podcasts offer opportunities to include primary sources, maps, photos, and sounds to visitors through their handheld devices. A podcast can bring new life to an historic place. Podcasts allow the visitors to experience the place at their own pace, to explore, reflect, and interact in new and exciting ways. Additionally, podcasts are relatively inexpensive to write, record, and post on the website of the host organization.

Broader uses for Podcasts

When sites and organizations lack the resources for high-quality exhibits and the volunteers to staff the sites, a podcast tour can deliver a high-quality interpretive experience at relatively low costs.

Podcasts (either video with audio or solely audio) can connect many different kinds of historical organizations with residents and visitors. Careful planning can take visitors to historic buildings, neighborhoods, parks, or even sites of vanished buildings to share the historic message in an engaging and entertaining way. One successful use of this technology is the Minnesota History Tour Walking Tour of Summit Avenue, designed by the Minnesota Historical Society.⁶² Another successful project is

⁶² <http://discussions.mnhs.org/tours/category/summit-avenue/>.

Downtown LA Walks. The website includes an extensive collection of podcasts including history, arts and culture, and shopping.⁶³

The podcast is very appealing to historical societies and public history organizations because it requires no volunteers or staff to provide first-person interpretation at a site. Where in the past a volunteer would need to lead a tour or be available outside a building for interpretation, now the podcast can provide a visitor with interpretation at any time of the day or night, at the location or away.

For those sites with physical exhibits, new technology and media offer rich opportunities for participation and interactivity. These can bring a new level of interactive experience to a historic site, including audio-visual displays and artifacts. While these can bring a new level of participation, new exhibit design and cutting-edge technology are very expensive. Most organizations surveyed do not have the budget to support high-level audio-visual exhibits that change every season. These can range in cost from \$20,000-\$100,000, a significant financial commitment.

But while technology can open new windows of interpretation, technology is understandably just an interpretive tool. Technology is most effective when the underlying interpretive plan is strong, relevant, and engaging for the visitor.

Coordination and Cooperation

During the Delaware County Public History Feasibility Study, many participants expressed a strong interest in heritage tourism. While there is great enthusiasm for new heritage tourism opportunities, great care and planning are crucial to developing an engaging educational tour. Merely lumping historic sites together with no thematic link or careful storyline development is not an effective way to develop a thematic heritage tour. Visitors demand engaging, carefully crafted tours that have an effective educational message and an exciting collection of stories. A quality visitor experience then, requires great coordination and cooperation among sites to assure that redundancy is minimized. For example, a quality theme tour of four historic sites should not have more than one site that explains the importance of a fireplace in a colonial home.

Getting ready for visitors

Sites interested in cooperating on joint tours or programming should also be clear about visitor amenities at each site. Sufficient parking and good signage are basic aspects of visitor readiness. A meticulously clean public restroom is also essential. Common hours among cooperating sites are crucial so that visitors are welcome at each site during the posted hours. Sites considering joint programming or tours must have the volunteer capacity to be open when they say they will be open on weekends, when visitors are most likely to come. Cooperating sites must use and post common marketing materials on each participating historic home's website and actively link to its partner sites. Finally, publicity is essential to alert potential visitors about the joint program. Relationships with the Brandywine Conference and

⁶³ <http://www.downtownlawalks.com/?f=podcast>.

Visitor Bureau and other venues are a must. Advertising is essential if visitors are expected to take advantage of the new joint programming being offered.

Theme tours for Delaware County, a pilot project

In order to present this new style and way of thinking about interpretation in the Delaware County, four pilot tours emphasizing important stories, as yet untold, in the county's history have been developed. These themes were selected based on the availability of historic resources, the opportunity to present a new story or theme, and the possibility to engage new audiences and segments of the county population for a half-day tour.

"Early American Living" explores a collection of existing historic houses and presents them with a more dynamic and engaging theme; tracing the development of early American living over many years. Sites were selected based on their period of interpretation, accessibility, and quality. There are many colonial historic house museums in Delaware County, and it would be impossible to include everyone in a half-day tour. Many of these sites have guided interpretation, but for this thematic tour, the interpretation would need to be carefully crafted to illustrate developments and relationships and to avoid redundancy. In order to create an engaging interpretive experience, the tour would need to be carefully planned. Additional experiential elements: touching artifacts and materials, attempting craft, tasting appropriate food, and participating in social activities would be a major part of this upgraded thematic interpretation.

"Victorian Splendor" highlights Victorian sites and the growth of the Railroad Suburb. This tour presents a new story, thematically arranged to present many elements of Victorian life and its link to Victorian cities and architecture. These sites were selected for their quality and historical stories. Accessibility is a major challenge with this tour as some sites are not open to the public. Because many of these sites are held privately, a podcast tour or a personal guide would be essential to this historic tour. The tour would also need to identify appropriate visitor infrastructure needs including restrooms and dining.

"Making Delaware County" showcases the growth of industry and commerce in Delaware County. Presenting more than 300 years of development, this tour reveals how industry had a major hand in "making" Delaware County. Sites were selected based on a "hub and spoke" model. Visitors begin the journey at the staffed Newlin Gristmill and then visit other sites that continue the story. These sites dramatically illustrate the growth of industry in Delaware County. Some of these sites are not open to the public, so a guide or podcast is essential.

"Reaching the Dream" is a social history tour, presenting immigration and civil rights events in Delaware County. A first-of-its kind tour, it presents significant questions about ethnic and racial history in Delaware County. Sites were selected for their social importance in Delaware County history. Because none of these sites are staffed or formally interpreted, the tour would need either a personal guide or a podcast tour. For those charged with developing these tours in the future, it is recommended that tour developers work closely with the Delaware County Planning Department on tour design and historical accuracy. Please see the specific recommendations about theme tours in the recommendation chapter of this report (page 106).

Because many of these sites are not formally interpreted now as museums or through other media, these tours need interpretive techniques to engage and present the history of these sites. This can be a personal guide, a bus tour, or a podcast tour. These interpretive tools are crucial, because visitors expect high-quality and engaging interpretive experiences. A mere paragraph in a brochure is not sufficient for these un-staffed and private historic sites to reach their educational potential.

Demonstration program

These tours offer a pilot or demonstration opportunity to present new historic events, eras, and questions beyond the current offerings in the Delaware County. There are other tours that can be developed based on the themes found in the National Register listings or PHMC Blue Marker programs. Other themes include:

- Religion (beyond Quakerism),
- Education, Social Reform, and Humanitarianism,
- Agriculture,
- Ethnicity & Immigration,
- African-American,
- Medicine & Health,
- and Art & Entertainment.

Committees that take on the development of theme tours may select different topics than presented here based on their own interests. If other tours are preferred, please see Appendix D, the complete list of blue markers placed by the Pennsylvania Historical and Museum Commission, as well as a listing of all the individual listings and historic districts on the National Register of Historic Places. These are the primary sources used to create these tours and provide baseline, quality materials for tour design.

Recommendations

The Delaware County Public History Feasibility Study and Implementation Plan includes recommendations for moving public history forward and an Action Plan in the short-term (one –to two years), mid-term (three to five years) and long-term (five to ten years) based on the needs and desires of the 80 historical organizations that participated in the year long Public History project.

Existing Conditions

The current countywide organizations provided many useful services for the many historical organizations and for the public. These services are geared to each organization's particular expertise and its individual mission. The Delaware County Planning Department, with one of their expertise in the field of preservation, offers the public guidance on preservation planning, ordinance creation, and documentation of resources. The Heritage Commission, as liaisons to County Council, is able to express the concerns of the historical organizations to Council. They also serve as supporters to local organizations through letters of support for preservation efforts and through recognizing efforts to preserve heritage through their awards. The Delaware County Historical Society is the countywide historical society whose library and museum provides a wealth of knowledge on the county's history that cannot be found elsewhere. Their expertise in education through their well-respected Passport to History Program has served as a great asset for the public and historical organizations. The Brandywine Conference and Visitors Bureau's staff has great expertise in marketing and promoting organizations and have provided a great deal of publicity for many historical organizations. The Planning Department, the Heritage Commission, and the Historical Society have all offered seminars on various subjects through the years.

Besides the efforts of the countywide organizations, many of the local organizations have provided projects that have served a countywide need. The larger organizations in the county, such as the Colonial Plantation, the Newlin Grist Mill, and Tyler Arboretum, not only serve this county but also draw visitors from around the region. They also have specialized expertise that they share with the public through a wide-range of services that attract many visitors. Smaller organizations hold special events that draw large crowds, educating the public on local history. These organizations draw on their personal connections, incorporating individuals from other sites with different expertise, to provide a better experience for the public.



Colonial Plantation, Edgmont

Even with all the work that is currently occurring, the surveys, interviews, and focus groups have demonstrated that the historical organizations want to do even more of these activities and want to build upon previous work to create new projects and goals.

The following recommendations, organized according to the various topics that were discussed time and again, flow from the many project ideas that were expressed by the 80 historical organizations during the surveys, interviews, and focus groups and the needs identified by Heritage Consulting through the analysis of the data. Rather than focus on the more developed organizations that have sophisticated funding streams and staffing to implement activities, these recommendations are targeted at volunteer-managed and dependent organizations.

Throughout the Feasibility Study, it became clear that the most effective means of achieving all of the identified needs would be the creation of a new consortium organization comprised of the representatives from the various historical organizations including county-wide, municipally based, and site specific organizations. This chapter includes an action plan outlining the creation of the consortium and how it would address all the specific needs identified in the surveys, interviews, and focus groups. As such, the Action Plan details the consortium's development as an entity through subsequent years and how the consortium could implement the project-specific recommendations in the short-term (one –to two years), mid-term (three to five years) and long-term (five to ten years). Additionally, the Action Plan includes in the short-term recommendations a variety of tasks for the Delaware County Planning staff members to help and support the development of the consortium in the event the historical organizations in the county choose to form one.

Even though this consortium is recommended as an effective tool to address the needs, any individuals or groups of individuals can also implement the project specific recommendations listed below to better strengthen their organizations. These project-specific recommendations can be implemented individually or be grouped together to be implemented together by regional coordinating efforts. Implementation of any of the recommendations would benefit the historical organizations in the county, and the Delaware County Planning Department could assist any efforts to implement this Plan.

Recommendations

The following recommendations are organized by the specific needs of the 80 historical organizations as identified from the results of the Project.

1. Information Sharing between historical organizations

The surveys, interviews, and focus groups demonstrated that many of the organizations are unaware of the specific operations of each other. It is recommended that there be a one-point source for all current information where all groups can access information as well as submit information.

- a. The first recommendation is that there be a continuously updated website with an electronic directory easily accessible that lists all organizations and their contact information. . This website should be updated to include links to individual organizations' websites. There should also be links on the individual organizations' websites that connect to the collaborative site.
- b. In addition to a directory, an electric Joint Calendar, where individual organizations can post their events, should be created to inform organizations of dates of others' events to encourage

countywide and/or regional coordination of public history events. This will minimize overlapping and competing events.

- c. In addition to making information available on the website and calendar, the current listserve should be used to provide two-way communication among those involved in public history in the county. Any member of the listserve can send information and questions to the whole membership. An example of information that could be shared via the listserve is Delaware County Planning Department's informal list of names of speakers on topics related to heritage and local history issues

The website, electronic calendar, and listserve will strengthen the community of the 80 historical organizations and help them to work together to present public history. It should be noted that during the Project, a website and a listserve were created to perform these functions and is called the Delaware County Historical Preservation Network.

2. Collaboration

Throughout the surveys, interviews, and focus groups, participants expressed the desire to build on existing relationships among historical organizations and work together. It is recommended that historical organizations in Delaware County create more formal collaborative efforts to present a more cohesive and inclusive representation of its heritage to the public.

- a. To facilitate these collaborative efforts, several meetings between similar organizations should occur, including meetings between staffed sites, meetings between HARBS and Historical Commissions, and meetings between municipal-owned sites.
- b. These formal collaborations should be based on regions, themes, and time periods and should include different types of organizations (i.e. historical societies, historical commissions, HARBS, sites, and preservation organizations).
- c. Organizations should consider collaborating on and updating a complete county history book through various methods, including using it as a dissertation project, having various local historians write topical chapters, or commission the work.
- d. Organizations can collaborate to cut some of their costs by organizing a co-op or bulk buying of commonly used items or consulting services.

3. Technical Assistance

One of the opportunities identified during the SWOT analysis of the survey results is the potential to mitigate weaknesses and threats identified through an aggressive effort to provide training and technical assistance to the historical organizations. Training would help to build the organizational capacities of these nonprofit organizations, particularly those organizations with no staff and small budgets.

- a. Quarterly training sessions should be hosted to provide technical assistance to the historical organizations. The list of topics that are of most interest to the 80 historical organizations is included in the Focus Group Report (page 53). Among topics that should be considered are collections management, budgets, funding, volunteer recruitment and management, and marketing. The seminars could be funded through charging a nominal admission fee.
- b. In addition to the quarterly training sessions, the Heritage Commission is encouraged to use the list of topics of interest for their annual seminars.
- c. Delaware County Planning Department's informal list of consultants, contractors, and other people with special skills as well as its list of speakers on topics related to heritage and local history issues should be expanded and made available to the historical organizations.

4. Collections Management

The data collected throughout the surveys, interviews, and focus groups identified a great need for collections management. In order to ensure a sustainable future of public history in Delaware County, objects and archives need to be preserved and well managed. In addition, these objects and archives should be inventoried and catalogued so that they can be made available to researchers and the public.

- a. A workshop/workshops should be held that discuss mentoring programs and assistance with inventorying, cataloguing, and storing of collections in appropriate facilities and boxes.
- b. Individual historical societies' storage needs for their collections need to be outlined, and historical societies should work with their municipalities as well as other historical organization to establish appropriate facilities to store collections.

5. Interpretation Update

Research conducted during the Project found that the interpretative activities of many historic sites and public history organizations throughout the nation no longer energize visitors and fail to reach new audiences. In order to re-energize visitors and reach new audiences, Delaware County historical organizations need to update their interpretation program and activities.

- a. A training session on interpretation should be an early action activity in order to address the quality of interpretation. This training session would inform historical organizations of the evolving national trends in interpretation that are moving beyond the traditional guided tour to include more interactive interpretation that allows the visitors to engage with the information. Sample innovative programs would also be presented to these organizations. It could be hosted by DCPD, or it could be one of the early quarterly training sessions.
- b. The Study revealed that most of the history presented by the historical organizations focuses on early colonial settlement in Delaware County. It is recommended that the organizations expand their interpretation to include diverse narratives of peoples and time periods.

- c. Historical sites should consider upgrading interpretation and possibly creating an interpretation plan before planning new tours. The Interpretation chapter of the Feasibility Study includes potential interpretation updates and historical themes to explore.

6. School Tours

The concern about the inclusion of local historic resources in primary and secondary education repeatedly surfaced in survey responses and historic site visits. Many sites noted the declining visitation and participation from local schools. Involving the school systems in their outreach allows historical organizations to further realize their educational missions. In addition, improving relationships between historical organizations and the local schools will increase public awareness of the historical organizations.

- a. The Planning Department staff can play an important role by calling together the volunteer managed sites for a panel discussion/seminar with education officials about school involvement with local historic sites.
- b. The quarterly training sessions can build upon the Planning Department's panel discussion/seminar to further educate the historical organizations on the needs of the school system, including the Pennsylvania Standards for History. Developing more intensive lesson plans with more interactive activities that meet the Pennsylvania Standards for History would encourage teachers to include local history resources. Consider using interns, students in educational programs, and retired teachers to develop and refine lesson plans for volunteer-managed sites across the county.

7. Tourism

During the Delaware County Public History Feasibility Study, many participants expressed a strong interest in heritage tourism. While there is great enthusiasm for new heritage tourism opportunities, planning needs to occur to address issues hindering tourism. With concentrated effort, tourism development can occur in Delaware County with the cooperation of staffed historic sites, volunteer run sites, and the Brandywine Conference and Visitors Bureau.

- a. A team of scholars and local historians can be created to vet the quality of the research and interpretation methods to be used for any theme tour being developed to ensure that the information presented during theme tours is accurate and provides a high quality visitor experience.
- b. This information can aid in the development of new tours that link staffed sites with volunteer-run sites through similar themes, time periods, or new narratives using new methods including self-guided tours, iPods, and downloadable driving brochures and itineraries. Examples of new theme tours can be found in the chapter on interpretation, page 79.
- c. In order to increase visitation, it is recommended that volunteer-managed sites work towards opening their sites on a regular basis, especially on weekends in season, because sites cannot be

tourist destinations if they are not open when people are most likely to visit. Odd hours or by-appointment-only hours hinder visitation.

- d. The Brandywine Conference and Visitor's Bureau (BCVB), the County designated tourist entity, is a potential resource for historical organizations. Organizations should consider this resource of when planning tourism activities. For example, the BCVB will aid its members in designing brochures.
- e. One potential tourism activity is a heritage weekend event, a long held wish of the Delaware County Historical Society. This event would be held once a year in good weather when all the historic sites and historical societies are open set hours and available for visitors. This will both increase public awareness and foster collaboration between the sites and organizations.

8. Capital Repair

The surveys indicated that the restoration and repair needs at Delaware County historic sites are staggering based on a mixture of hard costs and estimations. The needs are financially greater than most organizations can individually manage. The historic sites need to investigate many avenues that can aid in their restoration and repair needs.

- a. Delaware County has been fortunate that Community Development Block Grants (CDBG) have been used for capital repair needs to historic resources. Historical organizations are encouraged to take advantage of this funding.
- b. Because some of the sites are municipally owned, sites will need to work closely with their municipalities on maintenance concerns.
- c. Historical organizations should consider advocating for Delaware County Council to create a County- administered grant pool of matching funds for planning and capital repairs.
- d. The current Maintenance Guide prepared by the Planning Department should continue to be promoted to the historical organizations as a way to properly maintain their sites. This will minimize future repair needs.
- e. A checklist on ADA compliance would be beneficial to assist historic sites to determine the level of intervention necessary to meet the letter and spirit of the ADA requirements for historic sites.

9. Implementation

From the discussions in the interviews and focus groups and with guidance from the project Steering Committee, it was determined that the most effective method of achieving all the above mentioned recommendations in a formal and organized manner would be to create a new consortium organization comprised of representatives from the various historical organizations.

This final recommendation is outlined as an action plan that details the creation of the consortium group and how it will implement the recommendations listed above.

Action Plan

Action Items Completed During the Project

Including a Project Steering Committee, Public Meetings, and Training Workshops

At the suggestion of Heritage Consulting Inc., and beyond the original scope of work, a Project Steering Committee was formed, and it met four times during the yearlong project to provide advice to the consultants on the substance of the survey form, focus group script, and the creation of a new nonprofit entity to carry forward the work in the Implementation Plan. The members represented Delaware County Planning Department, Delaware County Historical Society, Penn State Brandywine, and municipal-based historic sites and societies.

To promote greater investment in the project's outcomes, the consultants recommended that there be a series of four public meetings. The purpose of the public meetings was to share the results of the various phases of the project and conduct a one to two hour training workshop during which the 80 historical organizations could get to know one another and learn about best practices on topics of importance to them.

First Public Meeting; Project Kick-off Meeting



Kick-off Meeting

The first public meeting, the project kick off, was held on September 8, 2009. The Planning Department staff introduced the project and the consultants. The consultants facilitated two round table discussions during the meeting to discuss the biggest opportunities and challenges for historic sites, historical societies, preservation organizations, Historic Architectural Review Boards, and historical commissions that make up the 80 historical organizations within Delaware County. The 90 people who attended provided feedback on the most pressing topics facing the various historical organizations. This information helped in forming interview and focus group design.

Second Public Meeting; Survey and Interview Report and Volunteer Training

On January 26, 2010, the Planning Department hosted a second public meeting to discuss the progress to date on the Feasibility Study portion of the project. In addition to this status update, the consultants recognized the opportunity to undertake some technical assistance and training during that meeting. The consultants engaged Carola Lilly Hartley to present an hour and a half long presentation on "Volunteer

Recruitment, Retention, and Recognition.” This topic was the top rated need expressed by the survey respondents at the September meeting, and 65 people attended this training workshop.

Third Public Meeting; Focus Group Report, Research into Action, and Fundraising Training

Two months later on March 22, 2010, the Planning Department offered the third public meeting and educational session to highlight the Greater Philadelphia Cultural Alliance’s recent publication *Research into Action*, which details GPCA’s effort to double cultural participation in arts and culture in the greater Philadelphia region by 2020. Forty five people attended this meeting. During the second half of the meeting, Donna Ann Harris, one of the consultants, presented an hour-long workshop on “Fruitful Fundraising for Volunteer Led History organizations.” This topic, which focused on membership development and individual fundraising, was the second highest rated need from the survey.

Fourth and Final Public Meeting; Report on Recommendations

The final public meeting was held on May 24, 2010 to discuss the recommendations in detail. Prior to the meeting, two brief summaries of the recommendations were circulated in order to give the historical organizations an opportunity to review the basic ideas of the recommendations in order to discuss the ideas at the meeting itself and provide any comments or questions. Approximately 40 people attended the meeting. The meeting included a presentation of the recommendations in detail. Those present were asked to complete brief forms if they were interested in continuing their participation in implementing the Project. The implementation will begin at a meeting in June, and all those interested were encouraged to attend that meeting.



Final Public Meeting

Creation of the DCHPN List Serve, Website, Directory, and Joint Calendar

As a result of conversations held at one of the focus groups in December 2009, Christopher Driscoll, a board member of the Newtown Square Historical Preservation Society, volunteered to organize a Google Group list serve to permit anyone interested to share ideas, ask questions, and promote events. The list serve, which is organized as the Delaware County Historic and Preservation Network (DCHPN) went live on December 5, 2009. Within three weeks there were more than 60 members.

For many years now, the Delaware County Planning Department Historic Preservation staff and Heritage Commission chair Rich Paul had both maintained email lists that they used to announce events and activities. These email lists were combined with the DCHPN list, and now this list has more than 180 people who receive regular postings from their peers. The website and the list serve are hosted at the Newtown Square Historical Preservation Society website. Further refinements by Mr. Driscoll of the DCHPN website www.dchpn.org include a joint calendar, where list serve members can post their events. It also includes a directory of all the public history organizations in Delaware County with contact information including website e-mail addresses when available.

Short-term Recommendations; One to Two Years

The following recommendations flow from the need for a coordinating entity to manage the many project ideas that were expressed by the 80 historical organizations during the interviews and focus groups. Additionally, these short-term recommendations include a variety of tasks for the Delaware County Planning staff members to help and support the development of the coordinating entity and the organizational development of the historical organizations in the county.

Establish a Coordination and Management Organization, the Delaware County Historic and Preservation Network

Throughout the interviews and focus groups, participants discussed that there was no logical nonprofit organization currently in existence that was equipped to lead the projects recommended in the Implementation Plan. As previously mentioned, even though many of the needed projects fit within the missions of the various countywide organizations and the larger organizations, all the projects and needs do not completely fall within any existing organization's mission or expertise. Therefore, a new consortium should be created to help realize the projects in the Recommendations and join forces to serve as an educator, organizer, and advocate for all of the 80 historical organizations in Delaware County.

The following pages detail suggestions on the formation of this new organization, who should participate with it, and a timeline of tasks for it to undertake during the next two years.

Discussions with the Delaware County Planning Department staff and Project Steering Committee members have helped to refine the following short-term recommendations.

What is the DCHPN?

Currently, the Delaware County Historic and Preservation Network (DCHPN) is a website, with a directory and events listing, and a listserve- a technological way to share information. It should be expanded to form a consortium of representatives of all historical organizations to meet and implement the many projects identified in the Recommendations. Currently the Network's list serve reaches more than 185 people. There is a companion web site (www.dchpn.org), directory, and joint calendar.

The expanded Network could provide technical assistance, networking, and public and private advocacy to advance the work of historical societies, historic sites, preservation organizations, Historic Architectural Review Boards, and historical commissions here in Delaware County.

Who should be involved with DCHPN?

Anyone interested in participating should be invited to be part of an initial DCHPN Steering Committee. Interested participants will fill out a short application and be invited to participate in an organizing meeting in June 2010 to learn more. This includes the countywide and municipal-scale organizations and individual historic sites. There is a role for everyone. The joining of the many smaller groups, whose

main focus is to share with each other and in doing so, learn how best to thrive, will fuel this consortium approach.

How will DCHPN get started?

It is envisioned, at first, that DCHPN will be a leaderless entity that is run as a democracy and makes decisions by consensus. DCHPN will begin as a Steering Committee with many members and eventually evolve in the months ahead into a working board and project teams to oversee, fundraise for, and implement projects. Leadership for this effort will emerge from the group based on the passions of individuals to implement the following projects and inspire their colleagues.

Who will do the work?

The DCPHN's Steering Committee needs committed volunteers because there is no staff anticipated as no funds have been identified for administrative costs. The Delaware County Planning Department staff is willing to serve as the initial convener and coordinator of DCHPN on a very limited schedule in the coming nine months until the volunteer leadership emerges to take on administrative tasks. Project task groups or volunteer project teams will select specific projects that they wish to implement with the oversight of the DCHPN Steering Committee.

The Planning Department staff will serve as the initial convener and provide staff support while the DCHPN Steering Committee is formed and begins work. The County Planning staff will undertake the following tasks in the coming year to support the creation of the DCHPN:

- Remind people of meetings,
- Send minutes,
- Make copies,
- Secure meeting space,
- Monitor the existing DCPHN list serve and website,
- Encourage completion of work plans,
- Coordinate mission statement creation,
- Publish meetings, and
- Coordinate project team meetings.

There may be additional tasks for the Planning Department staff depending on the initial interests of DCHPN Steering Committee members.

Eventually, a small working board for DCHPN will emerge to take on the organizational aspects of DCHPN and day-to-day administrative duties. Project task groups or project teams will select specific projects they wish to implement with the oversight of the entire DCHPN Steering Committee.

Much transparency and accountability for projects will be needed by the project teams. Project Teams will be expected to report monthly on progress to the DCHPN Steering Committee and eventually to the

working board. Project team leadership will emerge for each project, and this leadership would be responsible for gathering additional volunteers and identifying funding to implement the projects.

Initial funding of the DCHPN

Funding for initial DCHPN activities should come from an informal reserve of funds that all Steering Committee members would provide as their commitment to the kick off of this effort. To establish a small bank account for the DCHPN Steering Committee efforts, a \$20.00 donation from each Steering Committee member as his /her commitment to the effort is recommended.

As project teams develop work plans for their projects, they will also identify funding sources (grants, sponsorship, fees etc.) to fund such tasks from the materials already prepared as part of the research for the Implementation Plan. Each Project Team project listed below includes a list of potential funders. The Steering Committee as a whole will vote on the early pilot projects and identify partner organizations (staffed sites and organizations) to serve as applicants if grant funds are needed.

No staff is anticipated for DCHPN unless grant funds are identified to help pay for some administrative expenses during the first several years. A membership model to provide basic operational funding for the organization is recommended. Additional revenue sources recommended are small fees for each of its training programs, in the range of \$5.00 to \$15.00 per session. Fees from workshops and the initial reserve will support costs for copying, facility rental, speaker fees, web hosting, and the like until a membership program can be implemented during the second year of these short-term recommendations.

The most important task that the Delaware County Planning staff needs to accomplish is to launch the DCHPN Steering Committee.

DCHPN organizational meetings

The following is a suggested set of initial meetings. The actual time frame and content of the meetings will be determined by those involved.

First organizational meeting:

The initial organizational meeting is designed to introduce the participants in the DCHPN Steering Committee to each other and to collect contact information. The main business of this organizational meeting is to set dates for the quarterly educational programs for the year and to identify a small task force of two or three people who will be responsible to find locations, set dates, collect fees, identify speakers (and costs), and report back to the Steering Committee at the next meeting.

The DCHPN Steering Committee should collect the initial \$20.00 donations to the organization to create a small bank account to pay for costs associated with start up. Prior to the meeting, one willing historical organization should be identified who would be able to be the initial financial custodian for DCHPN until the organization is ready to incorporate at a future date.

The list of projects from the Implementation Plan (page 87 see later in this report) will be distributed. People interested in working on specific projects will be asked to form a project team to begin developing a work plan for the coming year. This is meant to be an open process, and anyone interested in working on a project can sign up during the next meeting.

A small group of volunteers will also be needed to help with general administrative tasks as a means of transitioning the work from the Delaware County Planning staff to the DCHPN Steering Committee. Initial DCHPN tasks will include monitoring the DCHPN list serve, making suggestions on a new name, securing locations for regular DCHPN meeting, and setting up the next meeting for mission/vision statement review.

The DCHPN Steering Committee should also pick a regular meeting time, such as the third Thursday at 7PM. This meeting time should be convenient for most to attend. Project team meetings will be held at the convenience of DCHPN participants. The date and time for the next meeting should be decided, and the Planning staff member taking minutes should reiterate who will be completing tasks for the next meeting. Minutes of the meeting should be sent to all who attended within 10 days. An agenda for this meeting has been provided to the DCPD staff.

Second DCHPN organizational meeting:

The second DCHPN Steering Committee meeting should center on the educational programs for the coming year. The small task force will supply information on fees, dates, locations, topics and speakers for discussion by the group and vote to accept. The list of projects should be discussed to determine which ones are particular priorities. Attendees will sign up for projects they are most interested in and select an initial meeting date to discuss a work plan. Planning staff will discuss what a work plan is, how it will be used, and supply blank forms. Work plans will be due at the third meeting. Planning staff will also discuss next month's meeting on mission/vision statement. Sample mission statements will be handed out to review for the third meeting. Minutes from the previous meeting will be approved, and date/time/location of the next meeting will be set. The Planning staff will discuss how the fall educational workshop should be publicized and ask for a volunteer publicist. The Planning staff member taking minutes should reiterate who will be completing tasks for the next meeting, and minutes sent to all attended within 10 days. Project Teams should meet at least once in the intervening months to create their work plans for presentation in October. This meeting agenda has been provided to the DCPD staff.

Third DCHPN organizational meeting:

A third meeting of DCHPN Steering Committee should be held before the first educational workshop to set an initial vision and mission statement. As a new organization that seeks to coordinate efforts and work for the mutual benefit of the 80 historical organizations, DCHPN needs to create a short mission statement. Several examples have been provided so that this need not be a painful exercise.

More time should be spent during this meeting to craft an overall vision for the DCHPN effort that is based on the future goals flowing from the projects identified in the Implementation Plan and from other projects the organization wishes to identify for the future.

Ideally this meeting will take place in the evening and last no more than three hours. A small task force of a few people can finalize the mission statement and vision statement from this meeting to circulate for final approval from the Steering Committee as a whole. This meeting can also include final discussion of a new name for DCHPN. This meeting agenda has been provided to the DCPD staff.

The third DCHPN Steering Committee meeting should also be used to review and discuss the work plans of the various project teams. Ideally the work plans should be submitted to the Planning staff in advance so that they can be circulated at the third meeting. All the work plans must have realistic budgets including how the funds will be raised to implement the projects.

The purpose of the meeting is for all Steering Committee members to review the Project Team work plans and identify those that are most developed and possible to implement. Each work plan should be reviewed and suggestions made for improvement or a vote to approve. Once approved, the project team has the endorsement of DCHPN to begin identifying additional volunteers, partners for grant purposes, or raising funds as identified in its budget.

The next meeting will be a final review of other project work plans needing more information and of the final budget for DCHPN based on project team expenses.

Subsequent meetings of DCHPN:

After the creation of an initial mission and vision statement and the approval of work plans and budgets for DCHPN, the monthly meetings should follow a regular agenda where minutes and financial statements are approved, brief reports are made by the project teams on their progress, evaluations from the educational programs are reviewed, and any administrative tasks are completed.

The Network Steering Committee will have identified by this point a small corps of people who are interested in taking a leadership role for DCHPN. The Steering Committee can appoint or elect these people as the chair, vice chair, secretary, and treasurer.

The Steering Committee can also determine when it is necessary for the group to incorporate. The DCHPN Steering Committee could remain an unincorporated association for months, perhaps years, until it becomes necessary to incur the time and expense to incorporate and seek tax exempt status (501 3 c) for DCHPN as an independent organization. Incorporation will occur because of grant funding needs or for advocacy purposes. The leadership of DCHPN will determine when this step is necessary.

Internal and external communication for DCHPN

The DCHPN organization must communicate externally and internally about its work. The Administration Project Team will need to identify someone to moderate the DCHPN listserve and encourage active participation on it. Until this occurs, the Planning staff will serve in that role with Chris Driscoll as the DCHPN web master. Additionally project team members will need to work with the existing website to encourage participants to post items to the joint calendar.

The website is an excellent place to post the work plans for all project teams and their meeting dates/times. Over time, the web site can be used as an archive where all minutes, organizing documents, mission, vision statements, and work plans are posted.

There might be a need for a communications project team or someone to take on the role of publicist for DCHPN to assure that there is a media list and that press releases on DCHPN projects are sent to the appropriate media in a timely manner.

Social media is an important and growing means of communicating externally about organizational events and activities. DCHPN should consider establishing a Facebook page to develop an active base of supporters. Facebook can be used in conjunction with the www.dchpn.org website, to communicate news and keep everyone up to date on events and volunteer needs. The Google Group DCHPN listserve could remain as the internal communication vehicle to share organizational news and interests. A volunteer could manage the Facebook page in coordination with the Steering Committee. There are also additional social media opportunities, such as a blog, that could be fruitful if DCHPN has interest.

Development of membership program for DCHPN

The initial working capital for DCHPN will be fees for workshops and the initial small bank account created by the initial DCHPN Steering Committee and project team members. DCHPN should consider if it wishes to create a membership program for the organization as a means of providing regular, predictable support for its work. As an all volunteer organization to provide mutual benefits for its members, there is a benefit to spreading the costs for basic administrative activities such as bookkeeping, web site hosting fees, liability insurance, newsletter (print or e-newsletter), meetings, website upgrades, annual meetings, board development and training, to all that participate. Dues should cover these basic costs, but not be so onerous that a small volunteer run site would not be able to afford the cost if the value of the services provided is excellent. Like most charitable organizations in the early years of development, this decision to devise a membership program needs to be made with some care because there are additional administrative burdens put on the organization to create such a program and then renew members on an annual basis.

Grant management

As the Project Teams identify possible grant sources for their projects, some funding should be included in each grant for administration. In most cases the grant will be administered by the partner organization



Training Session Held During Study

that submits the grant on behalf of the DCHPN. Funds for administration include bookkeeping and financial recordkeeping, copying, insurance, and other routine overhead items.

Incorporation

DCHPN may decide to eventually incorporate as the work of the Project Teams becomes more complex and reporting requirements for grants with partner organizations demands it. DCHPN Steering Committee members will have to make that decision based on the growth of programming. Funds in excess of \$600 will be needed to pay fees to incorporate, prepare bylaws, and prepare and send the IRS Tax Exempt Status application (501 c 3). If outside consultants are needed to help prepare these documents, then there will be additional fees.

Short-term Public History Projects

Quarterly training sessions

The first educational session will be held sometime in the fall at a date, time, and location determined by the DCHPN Steering Committee. Planning staff will coordinate all logistics of this meeting in cooperation with the Project Team working on this project.

DCHPN's initial project is recommended to be a series of educational training workshops. The list of topics that are of most interest to the 80 historical organizations is included in the Focus Group Report (page 54). This list can be used to identify specific topics for the training sessions. All dates and topics need to be identified in advance so that the entire series can be promoted for the coming year.

With the assistance of the Planning staff, the DCHPN project team charged with this responsibility should identify topics and highly skilled speakers who have good regional reputations on these topics. Planning for the workshops should occur this summer with a target date for fall 2010 as the first workshop. Some topics are so evergreen (marketing, volunteers, and fundraising) that workshops on some aspect of each should be presented at least every other year.

Planning staff can assist in finding locations for training workshops if they are not held at the County Council meeting rooms. Planning staff can send out email invitations, press releases, take RSVPs and checks on behalf of DCHPN, and coordinate with speakers on handouts, equipment needs, and room arrangements. Alternatively, the DCHPN Steering Committee could accept all the RSVPs.

The educational training sessions should be promoted through the DCHPN list serve by press release to area newspapers and on the County website. The Steering Committee could offer a discount on the fees if individuals purchase multiple sessions in advance.

Part of the quarterly training sessions, should include time for a panel or round tables, where participants can share their experiences.

The Role of the Delaware County Planning Department as convener and during subsequent years

The Delaware County Planning Department staff will need to play an important role in pushing the Implementation Plan agenda forward in the coming six to nine months. They also play an important role throughout the two years of these short-term recommendations as the DCHPN Steering Committee is formed, begins to meet, and as the DCHPN Board and Project Team leadership emerges.

The Planning staff's role is to be the initial convener, mentor, guide, and campaigner for the new entity.

The Planning staff will need to devote approximately one day a week in the coming six to nine months to help DCHPN get off the ground, host the meetings mentioned below, and help the Project Teams identify funding sources and partners.

Short-term Recommendations

Public History tab, National Register and links

To further support the Implementation Plan, the Planning Department will create a new Public History tab on the County Planning Department website. Additionally the Planning staff seeks to upload the National Register listings in Delaware County as well as the Sandborn atlases. The County Planning staff will continue to encourage the historical organizations that have websites to link to each other and to the County website to provide more information about local history in Delaware County.

Continue to publish about the public history project

The County Planning office has already placed articles about the Public History project in the County's "Planning Matters" Newsletter and will continue to promote the Implementation Plan projects as they are developed.

Speaker lists

Currently the Planning staff maintains an informal list of speakers and consultants that they supply to historical organization. These lists should be reviewed and placed on the DCHPN Listserve as a means

of making it available. Updating and expanding the lists is a possible project for DCHPN volunteers, see information about these projects in the Mid-term Recommendations section. Many contractors and consultants are also available on the Preservation Alliance for Greater Philadelphia website.⁶⁴

Further publish the Maintenance Guide

The Planning staff has produced a useful Maintenance Guide targeted at local homeowners. This guide in PDF format has already been posted to the DCHPN list serve. The guide provides a basic format for maintenance that can be used for small-scale historic sites. The Planning staff should continue to promote the use of this guide to historical organizations.

ADA compliance and pilot projects

The Planning staff is also interested in creating an Americans with Disabilities Act (ADA) compliance checklist for use with historic sites. In terms of meeting ADA compliance many, but not all, of the historic sites in the county are listed on the National Register of Historic Places, either individually or as part of an historic district. This listing provides some measure of flexibility towards meeting the public accessibility requirements, but few sites have reviewed the basic ADA criteria. The Planning staff sees merit in developing a pilot project to use the checklist on a few sites to determine the level of intervention necessary to meet the letter and spirit of the ADA requirements for historic sites. They will be seeking sites, either staffed or volunteer managed, to use the checklist and participate in the pilot project.

Heritage Commission programs

The planning staff also provides support to the Heritage Commission, and it is recommended that the Heritage Commission utilize the list of topics of interest to the historical organizations (see page 54) as its annual conference additional educational workshops for the 80 historical organizations.

Interns to create context studies

To support the development of the theme tours and interpretation in Delaware County at volunteer managed sites, the Planning staff is recommended to seek funding to pay for interns to develop context studies. These context studies would be thematically based and provide base line academic research for the DCHPN sites that wish to develop thematic tours.

Coordinate with the Brandywine Conference and Visitors Bureau

The Planning Department staff should work closely with the Brandywine Conference and Visitor Bureau (BCVB) staff to encourage the individual sites to become members of the BCVB and take advantage of the many benefits available. Chiefly, it is important that all sites list their events on the BCVB website and take advantage of the free four color brochure design service (not printing) that the Bureau offers. A new

⁶⁴ <http://www.preservationalliance.com/>.

pricing structure for historic sites and organizations will be implemented soon. The Planning staff can also work closely with the BCVB as it updates its website and encourage sites and organizations to update materials on it. Coordination with the DCHPN project teams working on theme tours is an especially important role that the Planning staff can play.

Delaware County Planning Department to host meetings during years one and two

There are several other meetings during the upcoming year that the Planning Department staff should organize and host.

Meeting with staffed historic sites

The first meeting is with the historic sites that have paid staff. These 11 groups are the major tourist destinations in the Delaware County. These sites collectively hosted more than 200,000 visitors in the past year based on survey results. These attractions are highly developed tourist destinations and have substantial budgets and well-trained staff. They have an important role to play in furthering any heritage tourism agenda for the county, especially theme-based tourism that would involve both staffed and volunteer-managed historic sites. Staffed sites are the hub of most of the theme tours suggested in the Implementation Plan while the volunteer-run sites and historical organization are the spokes. This meeting needs to be informal and explain the results of the Implementation Plan and the important role the staffed sites can play in the future of tourism development as identified in the Implementation Plan.

Meeting on school tour programming

The chapter on school tour programming and field trips (page 60) identified the major reasons that so few of the volunteer run sites are getting the school visitors they desire to host. The Planning staff can play an important role by calling together the volunteer managed sites for a panel discussion/seminar about school involvement and local historic sites and organizations.

This panel would include two speakers as well as a County Planning staff member. The County staff member would provide a brief summary of the results of school participation including statistics about interpretive plans, school participation, and desire to work with local schools, as expressed in the results section of the survey. The second speaker should be Van Jurin, Social Studies Coordinator for the Delaware County Intermediate Unit. He would provide an overview of the Pennsylvania Standards for History and the associated guidelines that schools must meet to fulfill their legislative mandate. The third suggested speaker is Sandra Schaal, Social Studies Coordinator from the Marple Newtown School District. She would provide an overview of what schools look for in terms of local involvement with historic sites and ways to connect to schools as an historic site or public history organization.

The most important activity of the seminar would be a workshop to complete a “skeletal” lesson plan using the appropriate Pennsylvania Standard for History. Using the National Park Service’s highly regarded Teaching with Historic Places module, sample engaging lesson plans would be provided as models to emulate. Participating Delaware County sites and organizations would be asked to bring primary sources to use in crafting a preliminary lesson plan for their sites. Didactic materials could

include historical maps, photographs, drawings, small artifacts, brochures, advertisements, etc. Participants would leave with a completed worksheet and a foundation for a preliminary possible lesson plan for classroom use or school field trips.

Meeting with HARBS and Historical Commissions

In an effort to foster greater cooperation and coordination, the Planning staff can host a meeting with all the Historic and Architectural Review Boards and historical commissions. This meeting can help these bodies work together towards specific projects or help them to participate in broad advocacy activities identified by the DCHPN Steering Committee. This meeting should occur at least once a year.

Meeting on upgrading interpretation

The Planning staff can also assist the greater efforts of the historical organizations by hosting a training session on upgrading interpretation at volunteer run sites (if the DCHPN Steering Committee does not include this topic on its agenda for the first year). The quality of interpretation at many of the volunteer sites needs to be addressed if they are to participate in any of the theme tours identified below. This is a large and complicated endeavor that one short workshop cannot address. Interpretive planning as mid and long-term projects are included below. The Planning staff can begin the conversation with historic sites about what constitutes a quality visitor experience by having a speaker who can engage the audience and give some short-term solutions for longer term upgrades. This meeting can be held at any time in the first two years of the Implementation Plan development.

Meetings with municipalities about their historical societies

A training workshop on collections management, cataloguing, and taking inventory should also be hosted by the Planning staff this year to lay the ground work for the DCHPN Steering Committee (if this topic is not chosen for their first year of educational workshops.)

Discussions about collections management are a critical first task to undertake because only four out of the 15 historical societies have sites to house their collections. Eleven historical societies store their collections in peoples' homes. The majority of these historical societies are organized by the municipality and most lack any sort of budget or means to protect the fragile materials they are collecting for future generations of Delaware County residents.

If the Planning Department is willing, it can assist the local historical societies to advocate for funding and safe municipal locations to store their collections. A training program is suggested as a first step to raise awareness by these nascent organizations to learn how to store their collections, inventory them, and then create public catalogues and finding aides so that the collections can be used by the public.

As DCHPN develops its programs over time, it can assist these historical societies to advocate for joint funding to assist with collections management issues. In the mean time, the County Planning staff can

investigate whether the County Archives could accept municipal historical society's papers and the implications of storing collections there.

These meetings will most likely be held in the second year of the Implementation Plan.

Meetings with groups of sites to encourage more cooperation

The Planning staff has been working for months with a group organized by Rich Paul of the Delaware County Heritage Commission that wishes to develop a joint brochure under the umbrella of ECHO, Eastern Coalition of Historical Organizations. These self-organized regional cooperatives should continue to be encouraged and supported by the Planning staff and DCHPN.

These meetings will likely be held throughout the first two years of the Implementation Plan.

Meetings with state elected officials

Finally, the Planning staff can take the lead in setting up a meeting with DCHPN Steering Committee leadership to meet with State Senator Pillegi to discuss DCHPN's progress to date on implementing projects from the Implementation Plan. This meeting should occur after a budget and work plans for the year have been approved by the DCHPN Board to show real progress and seek the Senator's support. Meetings with other elected officials might also be wise, and DCHPN Steering Committee leadership should discuss this with the Planning staff from time to time.

Task calendar

To facilitate the Implementation Plan's initial year of work, a task calendar by month has been developed for the next two years.

FIRST YEAR	
<i>First month</i>	• First DCHPN Steering Committee meeting • Set dates for four educational programs for the year, discuss topics/speakers from list; • Start small bank account for DCHPN initial expenses and pay for rest of web hosting for the year. • Identify existing organization willing to serve as DCHPN's financial custodian until it is incorporated. • DCHPN Listserve and calendar monitored by Planning staff
<i>Second month</i>	• Second DCHPN Steering Committee meeting • Set dates/topics and locations for all educational workshops • DCPD updates current speaker bureau list • DCPD promotes use of Maintenance Guide • DCHPN Project Team projects reviewed, Project Teams formed; work plans due in Third month meeting • DCPD sends out invitations for Fall educational workshop
<i>Third month</i>	• DCHPN workshop on mission and vision statement created, discuss if a new name for DCHPN is needed; decide next month • DCPD convenes meeting with staffed sites to get their buy in about hub/spoke tour model and themes; involve BCVB in discussion • DCPD coordinates first DCHPN educational workshop and collect fees from participants/deposit • DCPD hosts meetings with groups of sites to encourage more cooperation • DCHPN list serve and calendar monitored by DCHPN volunteer
<i>Fourth month</i>	• Monthly DCHPN Steering Committee meeting; Project Teams submit work plans that identify possible funding sources in their work plans; Steering Committee as a whole vets which ones are best fit for early pilot projects, and votes to accept project; seek staffed organizations for partnerships for applications • Decide on new name for DCHPN if needed • DCPD sends out promotional literature for second educational workshop
<i>Fifth month</i>	• Monthly DCHPN Steering Committee • Have a representative from Chester County Historic Preservation Network come to Steering Committee to talk about their experiences during first year of startup effort; • DCPD creates ADA compliance checklist for historic sites; possible pilot to test checklist on willing sites • DCPD circulates school memo, hosts panel on school visitor needs • DCPD creates calendar of all meeting dates for Project Teams to encourage cross involvement on Project Team work on web site and list serve • DCPD hosts second educational workshop late in month and collect fees from participants/deposit
<i>Sixth month</i>	• Monthly DCHPN Steering Committee • DCPD to host meeting with HARBs and Historical Commissions • DCPD send out promotional literature for third educational workshop • DCPD hosts meetings with groups of sites to encourage more cooperation

	• DCPD sets date to meet with Senator Pillegi to discuss progress on implementation
<i>Seventh month</i>	• Monthly DCHPN Steering Committee • Host third educational workshop and collect fees from participants/deposit • DCHPN officers and DCPD meet with Senator Pillegi to discuss progress on implementation and seek advice on funding for projects
<i>Eighth month</i>	• Monthly DCHPN Steering Committee • DCPD hosts training on upgrading interpretation at volunteer sites; admission charged to pay for speaker
<i>Ninth month</i>	• Monthly DCHPN Steering Committee; Project Teams begin to identify projects for next year, begin work plans, to be submitted at Eleventh month meeting • Send out promotional literature for fourth educational workshop • DCPD hosts a meeting with groups of sites to encourage more cooperation • DCPD works with DCHPN to identify scholars and local historians to serve on a panel to vet the historical quality and accuracy of the theme tours
<i>Tenth month</i>	• Monthly DCHPN Steering Committee • Host fourth educational workshop • Roundtable meeting with all Project Team members to hear progress from each Project Team spokesperson
<i>Eleventh month</i>	• Monthly DCHPN Steering Committee; Project Team work plans reviewed for completeness • Working board meets on organizational tasks
<i>Twelfth month</i>	• Monthly DCHPN Steering Committee; Project Team work plans and budget voted on by Steering Committee. • DCPD hosts meetings with groups of sites to encourage more cooperation • Host planning meeting for next series of educational workshops for coming year. • Discuss if DCHPN is ready to be incorporated.

SECOND YEAR	
<i>First month</i>	• Monthly DCHPN Steering Committee • First quarterly educational workshop for the year • DCPD identifies funding sources for interns for context studies • DCPD hosts another meeting with elected officials to discuss progress to date
<i>Second month</i>	• Monthly DCHPN Steering Committee • DCPC hosts meetings with municipalities about their historical societies • DCPD updates current speaker bureau list
<i>Third month</i>	• Monthly DCHPN Steering Committee • DCPD hosts a meeting with groups of sites to encourage more cooperation • Roundtable meeting with all Project Team members to hear progress from each Project Team spokesperson
<i>Fourth month</i>	• Monthly DCHPN Steering Committee • Second quarterly educational workshop for the year • DCPD identifies funding for interns to help with interpretive plans
<i>Fifth month</i>	• Monthly DCHPN Steering Committee
<i>Sixth month</i>	• Discuss if DCHPN is ready to be incorporated. • DCPD to host meeting with HARBs and Historical Commissions • DCPD hosts meetings with groups of sites to encourage more cooperation
<i>Seventh month</i>	• Monthly DCHPN Steering Committee • Third educational workshop for the year
<i>Eighth month</i>	• Monthly DCHPN Steering Committee • DCPD hosts meetings with municipalities about their historical societies • Roundtable meeting with all Project Team members to hear progress from each Project Team spokesperson
<i>Ninth month</i>	• Monthly DCHPN Steering Committee • Planning meeting for educational programs for coming year • DCPD hosts meetings with groups of sites to encourage more cooperation • Project Teams begin to identify projects for next year, begin work plans, to be submitted at Eleventh month meeting
<i>Tenth month</i>	• Monthly DCHPN Steering Committee • DCPD hosts a meeting with groups of sites to encourage more cooperation • Begin to prepare budget to be voted on during twelfth moth • Roundtable meeting with all Project Team members to hear progress from each Project Team spokesperson
<i>Eleventh month</i>	• Monthly DCHPN Steering Committee • Fourth educational workshop for the year • Project Team work plans reviewed for completeness
<i>Twelfth month</i>	• Monthly DCHPN Steering Committee • DCPD hosts meetings with groups of sites to encourage more cooperation • Project Team work plans and budget voted on by Steering Committee • Discuss if DCHPN is ready to be incorporated.

Mid-Term Recommendations three to five Years

The following potential projects were identified in either the surveys, interviews, or during the focus group discussions. Not all of these projects are essential to the success of the DCHPN organization but all deserve to be considered among many competing priorities. Some of these projects are short-term and can be completed in a few months. Others are ongoing tasks that would need to be started and then maintained over time. Finally, there are several projects that are very large in scope and will require months if not a year of planning before they can be implemented.

DCHPN Organizational Development

Create project teams

Implementation of each project would be left to a project team or committee of people interested in working on the project and seeing it to fruition. The team will develop a work plan to conceptualize how to organize, fund, and implement its project. Some potential funding sources for each of these activities are suggested.

Confirm funder priorities

Most funding sources will require a partner organization that would be willing to submit grant proposals on behalf of the DCHPN project team. Most partner organizations need to be staffed and meet the requirements of the funder (audit, IRS 990, full time staff, strategic plan etc.).

Each project team will have to thoroughly research funder requirements before seeking a partner organization to discuss its possible involvement. Until a partner is found who will be the project applicant on behalf of the DCHPN project team, it is not recommended that Project Team members contact the funder directly as it may cause confusion.

DCHPN as applicant

Not all potential partner organizations will be willing to submit these proposals on behalf of DCHPN because they might already have projects pending with the funder or might not feel the project is a good fit for their missions. Regardless, a well-developed project can be presented to several potential partners until the DCHPN organization is established enough to submit on its own. Each funder has different requirements about who may submit applications. Most require that organizations be in existence for more than three years and have full time staff. Check the funder's website to determine its requirements. DCHPN may not be able to apply for grants on its own for many years due to funder requirements for full time staff, IRS 990 filings, audits, and other organizational infrastructure.

Funder lists

The list of potential funders found at the end of each project is not all-inclusive. These funders were identified during research for the Implementation Plan and are the most often cited funders of existing Delaware County historical organizations. Potential funders are reviewed below by the requirements for each funder cited and then organized by projects they are likely to support. This research was conducted in March 2010 and represents what was found on the funder's website as well as other materials at that time. There may be other funders, or these funders may have changed their priorities in the intervening years. Project team members interested in pursuing any project idea are recommended to review the current written and web based materials about potential funders and to understand all of the funders' application requirements and deadlines.

Below please find summaries of the potential projects that interested Delaware County historical organizations. These are presented in order of importance.

Mid-term Public History Projects

Cooperation among volunteer run sites

Building on the efforts of the Planning Department staff to assist historical organization to create countywide cooperative efforts and projects, DCHPN can continue to work with these existing cooperating entities and encourage others to form.

The organizations involved in theme tours should upgrade their websites and provide links to other sites with similar themes to encourage visitors to see more than one site. An excellent grant funded project would be to offer all sites that cooperate on a theme tour assistance to upgrade its interpretation, website, brochures, visitor services, and visitor infrastructure (restrooms, parking, signage etc).

Crucial to the development of projects that foster cooperation would be a potential partner organization to apply for funding. Other partnership opportunities could revolve around joint brochures, shared hours/days open, and shared consultants providing services to multiple clients, especially concerning upgrading interpretation.

Possible Funding Sources: Collaborative Activities

- Brandywine Conference and Visitors Bureau
- Ethel Sergeant Clark Smith Foundation
- Heritage Philadelphia Program
- William Penn Foundation
- PHMC Technical Assistance Grant (TAG)
- Delaware County Council

Enhance tourism to staffed sites; create new theme tours

The Planning staff will have already had preliminary conversations with the staffed historic sites and organizations to ascertain their interest in participating in a broader tourism agenda using a hub and spoke model as mentioned earlier in this chapter. If the Brandywine Conference and Visitor Bureau is interested in the further development of more tourism products such as theme tours, joint events, overnight packages, and weekend long events, then discrete projects can be developed between staffed and volunteer run sites and organizations to highlight existing destinations and volunteer sites based on specific themes. Please see the chapter on interpretation (page 69).

The first order of business will be for the DCHPN to work closely with volunteer-managed sites to open their sites on a regular basis, such as both Saturday and Sundays from 1-4 PM in season. Common hours are essential for all sites participating in any joint tours. Volunteer-managed sites will inevitably need to expand their volunteer corps to have enough volunteers who are willing to be trained and able to provide high quality visitor experiences.

A review is also needed of visitor services and amenities at each volunteer run site. In order to welcome visitors, it will be necessary for each site to have the following baseline amenities: website, printed literature, and basic visitor amenities (such as clean public restrooms, adequate parking for cars and tour busses, and signage). Careful attention must be paid to volunteer run sites that lack basic amenities (especially restrooms) as these deficiencies must be outlined in any joint brochure and on the organization's website.

Further development of tour planning is included in the section on Long-term Recommendations below.

Possible Funding Sources: Tour planning

- Brandywine Conference and Visitors Bureau
- Connelly Foundation
- NEH; America's Historical and Cultural Organizations: Implementation Grants
- NEH; America's Historical and Cultural Organizations: Planning Grants
- IMLS; Museums for America
- PHMC TAG

Create a team of scholars and historians to vet theme tours

Some preparation is needed before the collaborative project teams can begin work to identify funding to create the theme tours suggested in the Interpretation Chapter (page 79) and in the mid-term project list below. A team of scholars and local historians can be created to vet the quality of the research and interpretation methods to be used for any theme tour being developed in the county. The role of this team is to provide advice and assistance to the volunteers who wish to develop the theme tours so that they are accurate, rely on current scholarship, and provide a very high quality visitor experience. The Planning Department staff and key DCHPN members will be able to identify likely people to serve on this team, which will probably meet infrequently.

No additional funds are required for this recommendation

School programs and lesson plan development

The Delaware County Historical Society has an excellent program with their Passport to History, but its focus is fourth graders. There are additional opportunities to help develop school programs for other grades during the mid-term recommendation period. These projects will expand on the short-term workshop completed in the early months of DCHPN. After the initial school program workshop, historical organizations, especially volunteer-managed organizations, will have been introduced to the Pennsylvania Standards for History as well as to the specific needs and concerns of teachers and school educators when visiting historic sites.

Building from this foundational workshop, mid-term projects will work to improve and expand interpretation for school programs. More intensive lesson plans with more interactive activities can be developed with new partnerships.

The DCHPN Steering Committee can engage college-teaching programs to utilize in service or class projects to create lesson plans for volunteer-managed sites. This project could also partner a local college student with a volunteer organization, and the two will work collaboratively to develop a new lesson plan.

Fund for capital repair needs for historic sites

The surveys indicated that the restoration and repair needs at Delaware County historic sites are staggering. The total amount of money needed for renovation and restoration as reported by sites was a staggering \$22,154,000. Twenty million dollars of this total accounts for only two projects. The remaining capital costs are a more reasonable sum of \$2.2 million. This total is a mix of estimates and hard costs from reputable contractors. Fifteen of the 31 sites do not yet have estimates for needed work. For more information on the needed repairs at historic sites, please see page 37 in the

Survey Highlights and Analysis Chapter of this report.



Capital Repair Needs
Interior of Lansdowne Theater

The DCHPN organization could identify which sites have maintenance and repair needs and assist them in obtaining cost estimates for the needed work. In most cases, the municipality owns these sites and advocacy will be needed with the elected officials to identify funding sources. For the organizations that own their sites outright, they will need similar assistance to develop cost estimates so that they can prepare a fundraising plan or a capital repair campaign to seek funds from supporters and grant sources.

One source of funds that several historical organizations have already tapped is Community Development Block Grants (CDBG) currently available from the Delaware County Office of Housing and Community Development. DCHPN can make historical organizations and local governments aware of this substantial resource and advocate for and support organizations and municipalities that seek to apply for funds.

The repair and restoration needs of the 80 historical organizations in the county far surpass the sums available from County CDBG sources, and additional funds are needed. DCHPN could consider seeking the support of Delaware County Council to create a County- administered grant pool of matching funds for planning and capital repairs for nonprofit-owned and municipally-owned historic buildings. Because the survey tapped only 80% of the organizations in Delaware County and only half of the sites have cost estimates in hand for their repair/restoration needs, this recommended matching grant pool should contain at least \$2 million annually for a five year term, total \$10 million dollars. Funds for planning and capital projects could come from County bond funds or other capital sources.

It is recommended that there be one grant round per year and there be a competitive application process judged by an outside panel of experts. The County could require a hard (cash) match or soft (volunteer time) match as appropriate. Both planning and capital funds are needed. A maximum grant size in each category is suggested. Application requirements and criteria would need to be developed along with technical assistance to the applicants to assist with identifying sources of matching money (if hard match required). Volunteer run sites should not be expected to manage capital grant projects without competent consultants assisting them. A volunteer run site will need a paid project manager or consultant to represent the organization in dealings with the contractor on contractor selection, bid documents, creation of Request for Proposals, and project completion. Project managers should be an eligible expense under planning or restoration grants.

DCHPN should help sites research other sources for planning and capital repair needs. At the time of this Project, some possible past sources had been eliminated. DCHPN should research funding opportunities to ensure that these cut programs have not been reinstated after the publication of this document. The Greater Philadelphia Cultural Alliance has a good but not exhaustive database of private foundations that support arts and culture activities on its website, <http://www.philaculture.org/resources/resource-service-providers>.

Possible Funding Sources: Planning and Capital Funding

- Delaware County Council
- Heritage Philadelphia Program
- Claniel Foundation
- Save America's Treasures* (this funding program has been eliminated in President Obama's FY11 budget proposal.)
- William Penn Foundation

Planning Department interns

Planning Department staff can continue their work to assist historic sites in developing lesson plans. Summer interns from teacher education programs, hosted by the Delaware County Planning Department, can develop and refine lesson plans for volunteer-managed sites across the county. Finally, retired teachers could be approached to work with historic sites that wanted to develop lesson plans that meet the Pennsylvania Standards for History. There are many funding opportunities for educational programs because education is a major priority for many funders across the region.

Possible Funding Sources: Lesson Plan Development

- Ethel Sergeant Clark Smith Foundation
- Connelly Foundation
- Claniel Foundation
- NEH-Landmarks of American History and Culture Workshops for School Teachers
- NEH-Preservation and Access Education and Training
- NEH-- America's Historical and Cultural Organizations: Implementation Grants
- NEH-- America's Historical and Cultural Organizations: Planning Grants
- IMLS—Museum Assessment Program
- IMLS—Museums for America
- PHMC TAG

Lists of consultants, contractors, and vendors with special skills

Interviewees and focus group participants expressed the desire for a list of vendors who have specialized skills for living history demonstrators (ironmongers, butter churners etc.). Other participants sought names of re-enactors, consultants, and others with specialized skills.

Currently the Delaware County Planning Department has an informal list of consultants, contractors, or other people with special skills that they use for reference when local historical societies or historic sites seek vendors. This list needs to be expanded.

Currently the Preservation Alliance for Greater Philadelphia and Partners for Sacred Places have similar contractor and consultant lists. See their websites <http://www.preservationalliance.com/directories/restoration.php> and http://www.sacredplaces.org/professional_alliance.htm. Additionally, the Pennsylvania Historical and Museum Commission maintain a list of historians on its website http://www.phmc.state.pa.us/Portal/forms/National_Register/nr_survey_consultants.pdf.

The DCHPN organization could compile this list from existing sources (noted above) or refer people to these already existing lists. Additional names could be acquired through networking or through the DCHPN list serve.

No additional funds are required for this recommendation.

Speaker's bureau list

The Delaware County Planning Department maintains an informal list of names of speakers on topics related to heritage and local history issues. This list is used when a local historical society or historic site is looking for a speaker for a meeting. This list is not extensive now but could be useful if it were expanded and placed on a website or on the Delaware County Historic and Preservation Network listserve (www.dchpn.org) that is available to anyone. Ideally the speaker's bureau list would include contact information for the speaker (phone number, email address, and website) as well as speaker topics on the list. A model to emulate would be the Pennsylvania Humanities Council's of Commonwealth Scholars at <http://www.pahumanities.org/resources/presentations.php>. A method to gather names would be to put a call out on the DCHPN list serve and network among historic sites that often seek speakers for their public programs. Ideally, DCHPN would maintain the list of speakers on its website and update it regularly. The speaker list might be coordinated with the contractor list (noted above) to be most effective.

No additional funds are required for this recommendation.

DCHPN Organizational Development

By the end of five years, DCHPN should be incorporated, have a Board, have its own tax exempt status, have its own bank accounts, and possibly have its own staff either on a part time or a contractual basis to manage the grants and projects of the organization. As the DCHPN organization develops and more complicated partnerships are formed, the organization will need to undergo a review of its final mission and vision statements and create a long-term strategic plan. If the organization employs staff, there will need to be access to professional development opportunities.

Potential Funding Sources: Strategic Planning & Professional Development

- Philadelphia Cultural Management Initiative
- IMLS—Museums for America
- PHMC TAG

The next section of the report discusses long-term recommendations for projects between five and ten years in the future.

Long-term Recommendations Five to Ten Years

The following public history projects will most likely take longer to accomplish and therefore, could become later projects. The Delaware County Planning Department can help implement these projects regardless of who implements them or when they are implemented. As partners in the continued development of the existing historical organizations and tourism in Delaware County, the public history community can help foster the following important activities.

Long-term Public History Projects

Funding for joint projects

After five years of programming, DCHPN could be able to apply for grants on its own without a partner serving as the prime applicant because DCHPN should have a budget and a part time or consultant as staff to meet various funder criteria. Project proposals can be developed as pilot or demonstration projects. These small projects are excellent opportunities to test ideas and refine approaches to problem solving. There will be several opportunities for pilot/demonstration projects, especially concerning interpretation, tour planning, school programs, website development, shared staffing or consulting services, and technical assistance for historic sites or historical societies. Joint projects will be developed by DCHPN project teams based on the needs and interests of the member organizations.

Possible Funding Sources: Joint projects

- Delaware County Council
- Ethel Sergeant Clark Smith Foundation
- NEH-- America's Historical and Cultural Organizations: Implementation Grants
- NEH-- America's Historical and Cultural Organizations: Planning Grants
- IMLS—Museums for America
- PHMC TAG Grants
- Brandywine Conference and Visitors Bureau
- Connelly Foundation
- NEH- America's Historical and Cultural Organizations: Implementation Grants
- NEH--America's Historical and Cultural Organizations: Planning Grants
- IMLS—Museums for America
- PHMC TAG
- Sponsorship from hotel partners

Assistance to historical societies with no site for collections storage; upgrade catalogue/inventories

The single most significant weakness identified during the Study of the 80 historical organizations in Delaware County is the lack of storage and active care for collections at local historical societies. Only four out of the 15 historical societies have any sites to store their collections. Eleven historical societies store their collections in their members' homes because they have no space to store their collections at their municipalities. The majority of these organizations were started as municipal historical societies yet most have no budget or place to store or catalogue the materials they are collecting.

As a service organization of historical organizations in the county, DCHPN can work collectively with these entities to help them advocate individually to their municipalities to supply adequate locations for historical society collections storage. The DCHPN organization could work with the individual historical societies to identify the storage needs of their collections by hosting educational workshops. These workshops would feature mentoring programs and workshops on assisting these organizations with inventory, catalogue, and storage of their collections in appropriate facilities and boxes.

The purposes of an historical society are to collect, research, interpret, and preserve information or items of historical interest; however, it is just as important, that the organization makes these collections available to the public with appropriate finding aides so that they can fulfill the society's educational mission.

DCHPN can play a role in galvanizing the historical societies to work with their municipalities and to work together as a group to support appropriate facilities to store collections. In addition, DCHPN can advocate that societies catalogue their collections in order to make them publicly accessible. If the volunteers at the local historical societies see a benefit, then DCHPN, on their behalf, could encourage joint grant programs, shared consulting services, or partnerships between organizations.

Pilot projects or an initial planning grant would be an excellent project if a broad coalition of historical societies would be willing to act together to solve existing collection management problems and challenges.

Possible Funding Sources: Collections Management & Conservation

- Claniel Foundation
- NEH—Preservation Access Collections and Training
- NEH-- Humanities Collections Reference and Resources
- NEH--Preservation and Access Research and Development
- NEH--Digital Humanities Start up Grants
- IMLS—American Heritage Preservation Grants
- IMLS—Conservation Assessment Program
- IMLS—Conservation Project Support
- IMLS--Museum Assessment Program
- IMLS—Museums for America
- William Penn Foundation
- PHMC TAG

Mentoring program

As a service organization providing educational opportunities to its member organizations, DCHPN can offer informal and formal mentoring opportunities with and among the historical organizations that participate in DCHPN. If a formal program could be established, an ideal opportunity would be for an existing staffed site to work with a volunteer run site to increase its capacity to welcome tourists.

A mentoring program to emulate is the Wisconsin Archives Mentoring Service, see the website at: <http://www.wisconsinhistory.org/libraryarchives/whrab/mentoring/>.

No additional funding is required for this recommendation, a mentoring program.

Planning & implementation of themed tours at volunteer sites

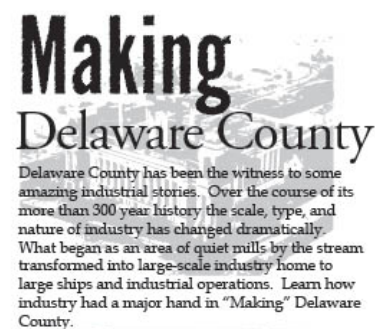
It is recommended that DCHPN take the lead in developing the theme tours identified in the chapter on interpretation, page 79. A small task force or project team could be created to identify funding and work plans to create self-guided, iPod, or downloadable driving brochures and itineraries for theme tours. Cooperation would be needed with the Brandywine Conference and Visitor Center to list these tours on its website and promote the tours.

The initial topics for the theme tours were drawn from the information gathered from all of the Pennsylvania Historical and Museum Commission Blue Markers in the county. These are available on the PHMC website at http://www.portal.state.pa.us/portal/server.pt/community/pennsylvania_historical_marker_program/2539/search_for_historical_markers/300886. Additionally, all the National Register nominations for the county were gathered and reviewed. These can be found on the NPS website at <http://nrhp.focus.nps.gov/natreghome.do?searchtype=natreghome>. These two lists were combined to identify overlapping themes during the timeline of 400 years of Delaware County History. See the Interpretation chapter (page 79) for further detail about the concept behind the theme tours.

The four half-day tours that were developed are meant as demonstration projects to expand the existing tourism products in Delaware County. These tours are

- Early American Living,
- Victorian Splendor,
- Reaching the Dream, and
- Making Delaware County.

Another developed demonstration tour The Spirit of Delaware County, is a two-day tour to determine if there was enough content to package a tour that might interest a hotel partner because it would involve an overnight stay. Working closely with the Brandywine Conference and Visitor Bureau to foster these partnerships and seek funding from hotel partners as sponsors to create the podcast itineraries is recommended.



If the theme tour project teams wish to explore other options for joint tours, funding could be solicited to pay for interns from graduate schools or high-quality undergraduate history programs to create context studies or statements to provide the intellectual rigor for theme tours. Additional tours can be developed based on the themes identified in the research for this Project or other topics. This builds on the

recommendation made earlier in the Mid-term Section to create a team of scholars and local historians to vet the quality of the interpretation and visitor experience.

Possible Funding Sources: Tour planning/tourism product development

- Delaware County Council
- Brandywine Convention & Visitors Bureau
- Ethel Sergeant Clark Smith Foundation

Upgrade interpretation at volunteer run sites

Volunteer-managed sites are in need of interpretive upgrades. Many sites lack interpretive plans or are offering tours and programs written more than 30 years ago. Many of these tours are hyper-localized with little relationship to regional or national stories and therefore will interest only a very limited local audience. Historical scholarship has radically changed in the last 30 years, and visitors demand far more engaging activities. Research indicates that trends in historic site management are rapidly moving away from the velvet-rope “guided tour” (see Interpretation Chapter page 69).

DCHPN, continuing the work of the Delaware County Planning Department, can work to present these evolving trends to volunteer-managed sites and provide sample innovative programs to these organizations. Additional training sessions can be held to assist volunteer sites to develop effective and engaging stories for visitors. Effective training modules for thematic tour methodology are outlined in the book *Great Tours!*⁶⁵ Additionally, DCHPN can promote joint guide training to better improve interpretive offerings at historic sites. Hospitality training might also be another objective for any volunteer that works with the public. DCHPN could identify and host hospitality training as needed and could assess interpretive offerings at historic sites and apply for grant funding to upgrade interpretation at historic sites.

Summer interns could be hired by DCHPN, DCPD, or DCHS to identify pilot interpretive projects to upgrade volunteer-managed sites.

Possible Funding Sources: Interpretation Upgrades

- Connelly Foundation
- Heritage Philadelphia Program
- Philadelphia Cultural Management Initiative
- NEH; America's Historical and Cultural Organizations: Implementation Grants
- NEH; America's Historical and Cultural Organizations: Planning Grants
- IMLS; Museums for America
- William Penn Foundation
- PHMC TAG

⁶⁵ Levy, Barbara A. *Great Tours! Thematic Tours and Guide Training for Historic Sites*, Lanham MD: AltaMira Press, 2002.

Technical assistance to historical organization/mentoring

DCHPN can continue and expand technical assistance training to the constituent organizations to build their organizational capacities to take on more complex projects. The entity could also provide very inexpensive mentoring or technical assistance to its members. A good example of this is the Greater Hudson Valley Network, <http://www.greaterhudson.org/index.html>,

The American Association for State and Local History provides a mentoring program for those new to the field of local history see <http://www.aaslh.org/mentor>.

Possible Funding Sources: Technical Assistance

- Delaware County Council
- Ethel Sergeant Clark Smith
- NEH; America's Historical and Cultural Organizations:
- Implementation Grants
- NEH; America's Historical and Cultural Organizations: Planning Grants
- IMLS; Museums for America
- PHMC TAG Grants

Delaware County Heritage Weekend

This project has been an idea of the Delaware County Historical Society for some time, and it would take a great deal of time and coordination. This project has great potential to draw day-trippers and overnight visitors into Delaware County. The concept is a weekend event held once a year in good weather when all the historic sites and historical societies are open set hours and available for visitors. Other events could also be planned for this weekend including walking tours or bus tours of one or several neighborhoods or sites. Heritage or ethnic festivals could also be planned during the weekend. Joint planning would be useful to undertake such a wonderful but complex project.

The event could be free if there was adequate sponsorship by hotels, tour operators, or other entities such as the Brandywine Conference and Visitor Bureau. Alternatively, the event could be ticketed, allowing the purchaser to visit as many sites/festivals/events as possible during the weekend. Each site could offer food, demonstrations, and items for sale to visitors beyond the free admission (or ticketed admission). Packages could be created with hotels in the area to promote the weekend for visits that include historic sites, shopping in historic downtown districts, or fine dining in historic settings.

A website could be used as the central information point as well as advertising in regional and partner organizations (i.e. Brandywine CVB, GPTMC, and radio and TV sponsor partners). A handsome and large full color brochure will be necessary as well as fulfillment for advanced ticket purchasers and one or more will call locations to pick up tickets on the event weekend.

Considerable coordination will be needed with the historic sites/historical societies, and probably a year of advance planning is needed to orchestrate sponsors, advertising, and publishing the list of open sites, tours, events, and festivals occurring on the weekend. Careful attention would have to be paid to parking at all sites, safety, directions to sites off the beaten path, and restroom availability at each site in order to assure that this is a quality experience for both the visitors and for the sites and organizations.

Coordination with the Greater Philadelphia Cultural Alliance's Arts Based Community Development program would be worth exploring, see <http://www.philaculture.org/resources/abcd/initiatives>.

Possible Funding Sources: Events

- Sponsorships
- Ticket sales
- Vendor fees, percentage of sales

Joint purchasing of goods/services

Several interviewees suggested a co-op or bulk buying opportunities for commonly used items or consulting services in order to ensure a lower cost for all involved. DCHPN could offer co-op buying for goods and services by working with specific vendors and consultants if there was enough interest from sites and organizations willing to participate. Interviewees and focus group participants suggested that common items such as computer software, restroom supplies, computer hardware, office equipment and other items could be subject to joint purchasing agreements. Additionally, this concept of co-op buying could also flow to consultants and trades people including architects, roofers, fundraising, public relations, curators, conservators, or other specialized professionals where group purchasing of consultant services could be made cheaper for all concerned.

Some service organizations in the region already offer different types of group purchasing or discounts with suppliers or vendors. The Greater Philadelphia Cultural Alliance offers discounted insurance, office supplies, and accounting services to members as resource service providers. See <http://www.philaculture.org/resources/resource-service-providers>. Chambers of commerce often provide discounted health insurance and other services.

In the future, if several sites were willing to pool their funds, they could jointly buy roofing services, for example. Another example might be creating a joint bid document for all the sites to offer to potential bidders, thus saving time and money for each site to create such a document for its project alone. A project manager could be hired on behalf of the sites and organizations to represent them and manage the joint projects. Another opportunity could be for DCHPN to offer employment or a fixed consulting contract to a staff curator or conservator who would provide services to a series of sites who would buy blocks of time to the consultant at a discounted rate.

No additional funds are required for this recommendation.

New scholarship about Delaware County

The only written comprehensive history of Delaware County was completed in 1884 by Henry Graham Ashmead, available on line at <http://www.delcohistory.org/ashmead/index.htm>. There have been many local history books published in recent years by Arcadia Press about various communities in the county, but there is no recent book that deals with the 19th or 20th century history.

Various approaches to this book have been suggested. One is to identify a young scholar who is looking for a dissertation topic who could write a sweeping history of the last two hundred years. Another is to identify a series of local historians and scholars who would be willing to write topical chapters that could, when taken as a group, deal with the main themes and issues in local history. A final option would be to commission the work from a working historian. Another method would be to create a website rather than a published book to contain most, if not all of, the same materials. There are several websites that provide templates for online exhibitions that might be worth exploring.

All of these methods have benefits and drawbacks, not the least of which is cost and timeline. If the topical chapters approach is the chosen method, then an editor and editorial board must be chosen to identify the themes and coordinate the work. If a website is desired, then an editorial board and web master have to be identified. This project team must identify the audience (academics or lay persons), potential publishers (if a book), content, and funding.

Possible Funding Sources: Research for New County History Book

- NEH: Collaborative Research Grants

Conclusion

There are many exciting projects contained in this Action Plan. Committed volunteers and organizations are crucial to moving public history forward in Delaware County. The Delaware County Historic and Preservation Network can be an effective coordination entity by building on the success and public response of the listserve and website (www.dchpn.org). Patience and careful planning will be required to ensure the success of the many exciting new initiatives, regardless if the activities are done by DCHPN or separate collaborative efforts.