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Restoration and Adaptive Use of a Historic English Country Estate: A Learning History

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**Restoration and Adaptive Use of a Historic English
Country Estate: A Learning History**

Anna D. Phoenix

Dissertation submitted to the
Davis College of Agriculture, Natural Resources and Design
at West Virginia University
in partial fulfillment of the requirements
for the degree of

Doctor of Philosophy
in
Human and Community Development

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ABSTRACT

Restoration and Adaptive Use of a Historic English Country Estate, A Learning History

Anna D. Phoenix

Within the field of historic preservation, often a single strategy for preservation is chosen from preservation, restoration, adaptive use or reconstruction. Occasionally it is appropriate to simultaneously implement two or more of those strategies. Adopting multiple strategies requires the involvement of different organizations whose goals and philosophies may clash. Stowe House is an example where restoration and adaptive use have been applied in tandem, forming the partnership of Stowe School, Stowe House Preservation Trust and the English National Trust. In this case forming a symbiotic tripartite partnership has resulted in the long-term survival of the Stowe estate.

The purpose of this study is to examine the restoration, adaptive use and historic site management of Stowe House, Buckingham, England using the narratives of individuals with controlling interest in the historic property. The Learning History Methodology (LHM), with its requisite interview process, was used as a means to record, validate and analyze various perspectives related to the preservation of the house. The completed narrative has the potential to inform future decisions made at Stowe and it may be useful to others undertaking similar restoration projects.

Many English country houses, once home to the elite, have been abandoned since the turn of the twentieth century due to the high expense of upkeep or the lack of heirs. Many have been destroyed, some have become house museums and others have been adaptively-used as schools or for other institutional uses (Martin, 1985). Stowe House, an eighteenth century Neo-classical ducal palace, was historically home to the Temple-Grenville family,

prominent political figures during the eighteenth and nineteenth century. The house is surrounded by over 400 acres of landscaped gardens. In 1923 the estate was adaptively used as a private boys' boarding school, called Stowe School (Bevington, 2002). After over six decades of use by young boarders, the property was in need of attention and the school could not afford the repairs.

The English National Trust obtained stewardship of the Gardens in 1989 and the Stowe House Preservation Trust (SHPT) was formed in 1997 to obtain funding and to manage the house restoration and visitor services. A multi-phase restoration process began in 2000, while the building continued to serve the school and receive 5,000 visitors a year. The SHPT, English National Trust and Stowe School each have distinct responsibilities in caring for the property. The complexities arising from this partnership creates a unique case study pertaining to issues surrounding historic site management.

The Learning History Methodology, developed at Massachusetts Institute of Technology, is a case study approach which tells the story of change in an organization (Roth & Kleiner, n.d.). Through interviews, each participant is able to anonymously communicate their own unique experience. The interviews are transcribed by the researcher and then validated by the participants. The researcher then analyzes the validated responses and creates an overarching narrative reflective of the change process as seen through a variety of lenses. In the case of Stowe House, the restoration process is being documented in order to influence future decision-making.

The data is presented in the form of a Learning History document, highlighting the benefits and challenges of the partnership model in operation at Stowe House. The data revealed insight into the dynamics of the partnership; illuminating successful collaborations

and areas of conflict between the partners. The Learning History document provides those involved at Stowe and those involved in the field of historic site management a learning document that explains the complicated partnership model and reveals opportunities for more efficient relationships and collaborations.

DEDICATION

To Coach C.

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“Of all the great things that the English have invented and made part of the glory of the national character, the most perfect, the most characteristic, the one they have mastered most completely in all its details, so that it has become a compendious illustration of their social genius and their manners, is the well-appointed, well-administered, well-filled country house.”

-Henry James, “*An English New Year*”, 1879 (as cited in James, 1993, p. 222).

CHAPTER I

Introduction

English country houses were once part of a way of life in rural England during the eighteenth and nineteenth century. Built by prominent architects such as Robert Adam, William Kent, James Gibbs and Christopher Wren, they were meant to demonstrate the wealth and prominence of the owner as he ruled over the local community. Power was based on land ownership, which the owner rented out to his loyal tenants. These self-supporting estates were the main employers of the local community, employing servants to maintain the interior as well as the extensive gardens and farms. Designed to impress, entertaining other nobles was a common practice at these homes.

As the economic structure of English society shifted during the Industrial Revolution, owners of country houses no longer enjoyed the same positions of prominence. Land ownership was ceased to be the basis of power. Urbanization, the expansion of cities and development of factory work, moved the center of life to the cities away from the countryside. By the turn of the twentieth century the high cost of maintaining such large country homes was more than most owners could afford. The pressures placed on English society during the World Wars and a burdensome, increased inheritance tax only added to the woes of the English country house owner.

Many of these meticulously designed and lavishly furnished country houses, once alive with activity, were abandoned due to the debts of the owner or the lack of heirs. Many were destroyed, their stones sold for re-use. Some sat empty and neglected for years until succumbing to decay. Thanks to early preservation efforts by the English National Trust and other organizations, some have been turned into house museums which can now be visited by

tourists, although only those homes with high national significance thrive as house museums. Others were adaptively used for institutional purposes such as hospitals, nursing homes, schools or hotels.

The decline of the English country house continues to present English society with the issue of how to preserve these magnificent pieces of architecture and the stories they tell about Britain's history, while also remaining relevant to the needs of modern society. Historic buildings are a limited and precious commodity; once destroyed they cannot be replaced. No matter a building's level of significance, however, without a purpose and relevancy to the local community a building cannot survive.

Stowe House is a country house that has survived the pressures placed on country houses during the turn of the twentieth century. The eighteenth century Neo-classical ducal palace was historically home to the Temple-Grenville family, prominent political figures during the eighteenth and nineteenth century. The house is surrounded by over 400 acres of landscaped gardens (see Figure 1 and 2).



Figure 1. North Front of Stowe House.



Figure 2. South Front of Stowe House.

Like many country houses, Stowe faced demolition in the early 1920s. The family was heavily in debt and with no heirs willing to take on the care of the building it was put up for auction. The Allied Schools Foundation bought the estate in 1923 and adaptively used it as a private boy's boarding school, called Stowe School (Bevington, 2002).

Upon first arriving at Stowe House in January of 2011, I was struck by the worn in feel of the building. It is not immaculate or pristine. It is indeed beautiful and awe-inspiring, but not perfect. It is not pretending to be younger or more modern than it is. There are cracks and mismatched stone; its age and imperfections are embraced (see Figure 3).



Figure 3. Close-up of North Front entrance.

Students in matching uniforms bustled from class to class, leaving notebooks and pencil cases on the steps of the North Front. This glorious building that could have been the setting for a Jane Austen film is being used in ordinary, everyday ways. It is not just on display, there were no signs saying “Do Not Touch,” no docent hovering; barriers common to most historic sites that are transitioned into a house museum. I love that something this beautiful is not reserved for a special occasion, only to be viewed one weekend a month; it is enjoyed every day.

The pupils and staff of Stowe experience the house unlike visitors to house museums, they live there. For a few months, I lived there too; attending recitals in the Music Room, eating meals in the State Dining Room, strolling in the vast gardens, admiring the many monuments placed throughout the landscape and enjoying afternoon tea on the loggia of the South Front, just like the Temple-Grenville family did three hundred years ago (see Figure 4). For a brief time, I was able to experience what it was like to be a member of the Temple-Grenville family.



Figure 4. View from South Front loggia looking out into the gardens.

Stowe's future was partially secured by the founding of Stowe School within the Stowe estate, but in 1989, after more than six decades of use by young boarders, the property was in need of attention and the school could not afford the repairs. That year the English National Trust (ENT) obtained stewardship of the gardens and the Stowe House Preservation Trust (SHPT) was formed in 1997 to obtain funding, manage the house restoration and open the house to the public on a regular basis. A six-phase restoration process began in 2000, while the building continued to serve the school and receive 5,000 visitors per year. The SHPT, ENT and Stowe School each have distinct responsibilities in caring for the property. The complexities arising from this partnership creates a unique case study pertaining to issues surrounding historic site management.

Problem Statement

Within the field of historic preservation, often a single strategy for preservation is chosen from preservation, restoration, adaptive use or reconstruction. Occasionally it is appropriate to simultaneously implement two or more of those strategies. Adopting multiple strategies requires the involvement of different organizations whose goals and philosophies may clash. Stowe House is an example where preservation strategies restoration and adaptive use were applied in tandem, forming the partnership of Stowe School, Stowe House Preservation Trust and the English National Trust. In this case forming a symbiotic tripartite partnership has resulted in the long-term survival of the Stowe estate.

Purpose of the Study

The purpose of this study is to examine the restoration, adaptive use and historic site management of Stowe House, Buckingham, England using the narratives of individuals with controlling interest in the historic property. The Learning History Methodology (LHM), with

its requisite interview process, was used as a means to record, validate and analyze various perspectives related to the preservation of the house. The completed narrative has the potential to inform future decisions made at Stowe and it may be useful to others undertaking similar restoration projects.

Research Framework

Learning History. The Learning History Methodology (LHM) used in this study provides a unique opportunity to observe the management partnership that has ensured the longevity of Stowe Estate. The anonymity and reflectivity of the LHM provides insight into the restoration and site management processes revealing strengths and weaknesses. LHM is credited to George Roth and Art Kleiner along with a group of social scientists, business managers and journalists associated with the Massachusetts Institute of Technology (MIT). The intent of using LHM in the current study is to illuminate the restoration process through the diverse experiences of individuals at Stowe, so that those involved with the management of Stowe can reflect on how to improve their operations. Future preservationists may also use the document to understand how to proceed with their own local projects. According to Peter Senge, author of *The Fifth Discipline: The Art & Practice of the Learning Organization*, “learning to see the structures within which we operate begins a process of freeing ourselves from previously unseen forces and ultimately mastering the ability to work with them and change them” (2006, p. 93).

While Stowe’s unique situation cannot be generalized to all house museums or even to all country houses, it does present one solution to the problem of managing country houses and an alternative to the typical house museum operations. This is not a comparison study of American versus British preservation methods, although it is possible to learn from what has

worked and what has been a challenge in managing and balancing the goals of three separate entities all housed within one estate. The lessons learned from observing the partnership model at Stowe can be applied to other house museums or restoration projects.

Delimitations. This project is delimited entirely to one fourteen-year period in the life of Stowe House in Buckingham, England (1997-2011).

Limitations. Although there are general lessons to be learned from others' experiences, the specifics of this study are limited to the time, place and people reported herein.

Definitions

“As preservation grows in scope and influence, the need for commonly held definitions grows apace” (Murtagh, 2006, p. 4). Therefore to provide clarification, the definitions of the following words will be used for the purposes of this paper.

Learning History A subset of the case study, this methodology relies heavily on the experience of people directly involved in the project. Information is gathered by completing a series of interviews of those involved to determine, from diverse perspectives, what worked and what did not. It involves the planning phase, reflective research, distillation, writing and validation, followed by dissemination and publication/outreach.

Heritage “All inherited resources which people value for reasons beyond mere utility” (English Heritage, 2008, p. 71).

Cultural heritage “Inherited assets which people identify and value as a reflection and expression of their evolving knowledge, beliefs and traditions, and of their understanding of the beliefs and traditions of others” (English Heritage, 2008, p. 71).

Historic building Historic buildings in England are those that have been identified by the English Heritage as significant and are considered listed buildings.

Historic environment “All aspects of the environment resulting from the interaction between people and places through time, including all surviving physical remains of past human activity, whether visible or buried, and deliberately planted or managed flora” (English Heritage, 2008, p. 71).

The English National Trust (ENT) An organization founded in 1895, the ENT was “set up to act as a guardian for the nation in the acquisition and protection of threatened coastline, countryside and buildings” (National Trust, 2011). The ENT developed its ‘Country House Scheme’ in 1936 as a response to the burdens placed upon country house owners in the early twentieth century. The ENT is now the largest private landowner in the country, with one percent of Britain’s total land and ten percent of its coast. It now administers 200 country house estates, most of which were acquired through the ‘Country House Scheme’ (Brand, 1994, p. 95).

English Heritage A quasi-governmental agency or ‘quango’, English Heritage “has the task of identifying and protecting this inheritance in England...by listing-recommending buildings for inclusion on statutory lists of buildings of ‘special architectural or historic interest’ compiled by the Secretary of State for Culture, Media and Sport” (English Heritage, 2011). The English Heritage is the government’s statutory advisor on the historic environment and encourages the public “to understand, value, care for and enjoy their historic environment” (English Heritage, 2012).

Listed Building A building that has been designated as historic by the English Heritage and given a grade of Grade I, II* or II. Grade I meaning the building is exceptional,

Grade II* (referred to as Grade II star), the building is particularly important and Grade II those of special interest (English Heritage, 2011).

Conservation A typical British term for referring to restoration; has a more positive connotation than the similar American term of Historic Preservation. “The process of managing change to a significant place in its setting in ways that will best sustain its heritage values, while recognizing opportunities to reveal or reinforce those values for present and future generations” (English Heritage, 2008, p. 71).

Significance [of a place] “The sum of the cultural and natural heritage values of a place, often set out in a statement of significance” (English Heritage, 2008, p.72).

Historical value “Value deriving from the ways in which past people, events and aspects of life can be connected through a place to the present” (English Heritage, 2008, p. 72).

Summary

There are many historic buildings and equally as many historic site managers seeking relevance for their historic building. The desire to save these buildings for future generations is noble and a natural instinct. However, in today’s economy we do not always have the luxury of saving a building simply because it is beautiful. In order to ensure the continued longevity of the building it must meet a relevant need in the local community.

This paper examines several topics related to the field of preservation, most notably adaptive use and restoration. The Learning History Methodology was used in this research to collect and analyze personal experience data through an interview process. Information regarding the steps taken to ensure the credibility and dependability of the research study are

discussed. Analysis and synthesis of the data are presented. Discussion about the research project and possibilities for further research are also included.

CHAPTER II

Review of Literature

The organization of the material in this review of literature is structured with the most general, broad topics reviewed first followed by increasingly more specific topic areas. The review begins with an overview of historic preservation theories, established preservation strategies and benefits of historic preservation. It then moves on to discuss the creation, preservation and tourism of English country houses. It concludes with discussion more specific to the unique situation of Stowe House in Buckingham, England.

Historic Preservation Theories

Historic preservation is a broad term used to represent a movement of valuing historic buildings for their beauty, architectural and historical significance and contributions to society. Historic preservation is “the integration of our architectural heritage with the present in a functioning relationship” (National Trust for Historic Preservation, 1976, p. 1). Within historic preservation there have been many theories as to how to achieve the preservation of historic buildings. Some outline strict views on what constitutes preservation while others have loosely interpreted the term, but all have contributed to the formation of modern preservation theories and strategies.

Preservation is a response to human beings natural instinct to leave a legacy for future generations. Roman emperors preserved buildings in order to associate themselves with their predecessors as a means to gain the same level of acceptance with their constituency (Williams, Kellogg, & Gilbert, 1983, p. 5). Many Japanese wooden temples have survived because parts were continuously repaired as they wore out (Williams, et al., 1983, p.5).

The modern preservation movement began in France in the 1830s and 1840s when the government realized that the country’s most famous landmarks had been neglected since

the Revolution. The Commission for Historic Monuments along with the archaeologist Ludovic Vitet, the architect Eugene Emmanuel Viollet-le-Duc and the writer Prosper Mérimée led the movement to save France's historic monuments (Williams, et al., 1983, p. 5). In doing so these forward-thinking men began developing early theories of preservation. While their theories are no longer considered appropriate, it was essential to starting a written dialogue about preservation that has been consulted by preservationists through the years and used as a starting point to develop new theories (Williams, et al., 1983, p. 5). The philosophies of preservation theorists such as, Eugene Emmanuel Viollet-le-Duc, John Ruskin, William Morris, Philip Johnson and Robert Venturi may contradict each other, however all of these men worked to lay the foundation for the preservation field. Viollet-le-Duc romanticized preservation by restoring to an ideal, Ruskin and Morris held to a very strict 'let it alone' philosophy, while Johnson and Venturi believed that preservation could be integrated into modern architecture both through design and historical materials.

Eugene Emmanuel Viollet-le-Duc. Eugene Emmanuel Viollet-le-Duc (1814-1879) was one of the first architects concerned with the restoration of landmarks. Prior to Viollet-le-Duc's influential discourse on historic preservation, the acceptable life-cycle of a building included natural deterioration. Viollet-le-Duc, considered the first restoration architect, believed that buildings should be preserved and rebuilt, not as the building had originally been built, but instead as he felt the building should have been built. Viollet-le-Duc wrote in *Dictionnaire Raisoné*, "To restore a building is not only to preserve it, to repair it, or to rebuild, but to bring it back to a state of completion such as may never have existed at any given moment" (Hearn, 1990, p. 269). William Murtagh, prominent American preservationist author and first keeper of the National Register of Historic Places, termed Viollet-le-Duc's

philosophy of restoration as “overzealousness: the replacement and enhancement of original fabric to produce a finished project which epitomizes the age and aesthetic of the period of its original creation” (2006, p. 3).

This approach to restoration is no longer considered appropriate by most preservationists because it confuses new additions with the original fabric of the building. However, Viollet-le-Duc was among the first to even consider some type of restoration to buildings and the knowledge of historical and technical information he cataloged is invaluable to the field of preservation. He produced a series of books documenting his methods, techniques and philosophy of restoration, including a ten-volume dictionary of architecture, titled *Dictionary of French Architecture from 11th to 16th Century* (1854–1868) (*Dictionnaire raisonné de l'architecture française du XIe au XVIe siècle*).

The preservation strategies of Santa Fe, New Mexico, USA provides a contemporary example of restoration projects loosely based on Viollet-le-Duc’s philosophy of restoring to an ideal, rather than to historical accuracy. During the early 1900s Santa Fe transformed itself into a Pueblo-Spanish fantasy through inaccurate, interpretative restoration and the removal of all recent Americanized designs. The city also implemented a historic design review process for all new buildings to insure the continuation of the fallacy (C. Wilson, 1997). This approach shows similarity to Viollet-le-Duc’s philosophy of adding new elements and embellishing without appropriate historical evidence.

John Ruskin. John Ruskin (1814-1900), an English architectural critic and social reformer, was also opposed to Viollet-le-Duc’s preservation philosophy. In his *Seven Lamps of Architecture*, Ruskin wrote that restoration

Means the most total destruction which a building can suffer: a destruction out of which no remnants can be gathered: a destruction accompanied with false

description of the thing destroyed. Do not let us deceive ourselves in this important matter; it is *impossible*, as impossible as to raise the dead, to restore anything that has ever been great or beautiful in architecture (Ruskin, 1969, p. 199).

He believed that new buildings and monuments should be built with such quality that they would last forever, and with “proper care ... you will not need to restore them”(Ruskin, 1969, p. 201). Ruskin’s theory of ‘let-it-alone’, as it is now known, was based on his notion that society had no right to improve upon the architectural works of past societies and craftsmen. “*We have no right whatever to touch them. They are not ours. They belong partly to those who built them, and partly to all the generations of mankind who are to follow us*”(Ruskin, 1969, p. 201). And only through age does a building really begin to achieve its beauty, “The greatest glory of a building is not in its stones, or in its gold. Its glory is in its Age” (Ruskin, 1969, p. 190). Murtagh notes that Ruskin felt restoration was simply an “intellectual process of destruction of original fabric and replacement with new materials, eradicating the patina of time in the process” (Murtagh, 2006, p. 3).

William Morris. William Morris (1834-1896) an English architect, painter and designer established the Society for the Protection of Ancient Buildings in 1877. He maintained a similar approach to Ruskin’s (Summerson, 1983, p. 22). He considered buildings that had been restored or reconstructed to be “sham” buildings (Summerson, 1983, p. 24). He would rather the building be demolished than reconstructed and inaccurately represent history. The Society’s theory became known as “anti-scrape.” Anti-scrape philosophy considers the removal (i.e. scraping) of any material from a building, whether or not it is original, impertinent and detrimental (Summerson, 1983, pp. 22-24).

Philip Johnson. Philip Johnson (1906-2005), modern day architect and preservation advocate, feels the current preservation movement in America is a sham. In a 1986 interview

Johnson referred to preservation as “‘rather a phony movement’ because it tries to restrict change rather than encourage it” (as cited in Tyler, 2000, p. 30). According to Johnson, change is history and preservation should reflect change and not put the past in a bubble. Johnson lamented that “Preservation can always be used as an argument to kill something” (as cited in Tyler, 2000, p. 30). Johnson’s comments allude to the fact that preservation can at times be manipulated by those with goals other than preservation. Unfortunately the protection that preservation offers to buildings can be abused to fit a multitude of agendas.

Robert Venturi. Robert Venturi (1925-) questioned the architectural modernist movement of the 1950s and 60s. Venturi sought to reestablish a conscious sense of the past. He encouraged architects to see the past in a broad context and time frame. He believed that, “tradition is a matter of a much wider significance” (Venturi, 1977, p. 13). Venturi held strongly to the idea that the past should become part of the present because of the richness of history the past holds and the meaning history adds to the present (Tyler, 2000, p. 30). Venturi’s book *Complexity and Contradiction* encouraged architects to accept historical architecture as an influence on contemporary design.

Strategies for Preservation

The term preservation has two meanings. First, is that of the very broad and generic historic preservation movement, relating to saving and valuing historic buildings through any of the four strategies of preservation to be discussed within this chapter. Second, preservation has a very strict definition as a strategy for preservation, which involves minimal interventions in order to protect the original materials of a building (Murtagh, 2006, p. 4). A.N. Didron, a French archaeologist, wrote in *Bulletin Archéologique*, “It is better to preserve than to restore and better to restore than to reconstruct” (as cited in Murtagh, 2006,

p. 4). Didron's statement provides a hierarchy of strategies for preservation in the order of most desirable for accurately preserving a historic building. Preservationists today still abide by this mantra. It is not an absolute rule however; as most preservationists will agree, the appropriateness of strategies differs from case to case. The four strategies for preservation include: preservation, restoration, reconstruction and adaptive use.

Preservation. Preservation refers to the maintenance of a property without significant alternation to its current condition (Tyler, 2000, p. 22). This involves applying measures to sustain the existing form, integrity and material of a building (Murtagh, 2006, p.5). The English Heritage defines the word "to keep safe from harm" (2008, p. 72). This approach accepts all subsequent additions and alterations to a building since its creation as a part of the history and integrity of the building, and includes them in the preservation. Using the preservation strategy it is important to preserve the building as is; maintaining as much of the fabric and as many of the architectural features as possible. Preservation includes initial stabilization work, if necessary, and ongoing maintenance of the historic building materials (Murtagh, 2006, p. 5). This strategy is very strict and very similar to Ruskin's let-it-alone approach and anti-scrape philosophy.

Restoration. Restoration is the process of returning a building to its former condition at a specific point in time (Tyler, 2000, p. 24). The English Heritage defines restoration as the process of "returning a place to a known earlier state, on the basis of compelling evidence, without conjecture" (2008, p. 72). If the restoration process is utilized the building will typically be restored to its original condition. However, the building may be restored to a later date if that date represents a significant time period in the inhabitant's life or a significant architectural style. This is an appropriate approach when portions of a structure's

historic integrity are lost or there have been inappropriate additions that need to be removed (Murtagh, 2006, p. 5). Restoration requires careful, thorough and appropriate historical research to produce evidence to support the decision to restore to a specific date. If documentation does not reveal significant evidence of the existence of a particular feature it is best to not include it in the restoration, or if necessary replace it with a comparable contemporary item.

Reconstruction. Reconstruction is “the act or process of reproducing by new construction the exact form and detail of a vanished building, structure, or object, or a part thereof, as it appeared at a specific period of time” (Murtagh, 2006, p. 5). This approach is appropriate when a historic structure no longer exists but it is needed for context. An example would be the reconstruction of slave cabins on plantation in order to provide context.

Adaptive Use. Adaptive use, at times referred to as rehabilitation, is the conversion of a building to a use other than what it was originally designed for, such as converting a church into a restaurant (Murtagh, 2006, p. 207). When this strategy is used, the exterior of the building is often kept original, but the interiors may be drastically changed in order to accommodate the new use (Tyler, 2000, p. 28). This conversion is accomplished with varying alterations to the building. The English Heritage defines an alteration as “work intended to change the function or appearance of a place” (2008, p. 71). Viollet-le-Duc believed “the best means of preserving a building is to find a use for it, and to satisfy its requirements so completely that there shall be no occasion to make any change” (Hearn, 1990, p. 276).

The potential problem with adaptive use is that it often requires extreme alterations to the historic building and at times compromises the historical character. The challenge lies in how to successfully allow adaptation for economic viability and still preserve the quality of historical integrity for which the building is being saved in the first place (Murtagh, 2006, p. 100). Samuel Harris, historic preservation architect and engineer, states that adaptive use projects have the potential to “compromise a building’s fabric, interpretive ability, and other qualities with adaptive use projects; but they save the building” (1993, pp. 16-18). It is possible to minimize these compromises by ‘fitting a use to a building rather than fitting a building to a use’ (S. Harris, 1993, p. 24) so that the necessary alterations are not extreme.

Stewart Brand, author of *How Buildings Learn: What Happens After They’re Built*, believes that “adaptive use is the destiny of most buildings” (1994, p. 109). Increasingly, preservationists are viewing adaptive use as an appropriate means of preserving a building. Not every historic home is significant enough to become a successful house museum. Using an existing historic building for a new use has become a practical way of preserving historic buildings because their income can be applied to the maintenance and further preservation of the building (Van Rensselaer, 1966, p. 98).

The English Heritage encourages the continued use of listed buildings either for their original intended purpose or for a new compatible use. They recognize that the long-term sustainment of a building will most likely require continued adaptation in order for them to remain relevant to their communities (English Heritage, 2008, p. 43). The Landmark Trust of England is a building preservation charity that rescues historic buildings at risk and then rents them for overnight accommodations (Landmark Trust, 2012). One building used in this way is the Trust’s Gothic Temple on the Stowe estate grounds (see Figure 5).



Figure 5. Gothic Temple, located within the Stowe Gardens

Designed by James Gibbs and formed by Charles Bridgeman and William Kent in the Gothic style in 1741 the Gothic Temple was one of the last additions to the gardens (Landmark Trust, 2012). Its brown ironstone construction material gives the building its striking orange color. The pointed arched windows and castellated parapets give this two story building the look of a Gothic cathedral. Located at the top of a small hill, the Gothic Temple offers many views overlooking the gardens of Stowe.

In order to determine if adaptive use is the most appropriate strategy for preservation a feasibility study including an analysis of the local market, a physical analysis of the building, an architectural and historical evaluation must be done. Questions regarding the potential market, the local demographic characteristics, other local developments, competition and access to the area must be asked in order to determine if the new use is needed in that community (Murtagh, 2006, p. 100). A physical analysis of the building is

next. Is the building stable? Are necessary repairs minimal or extensive? Issues regarding local building and zoning codes must also be addressed.

An architectural and historic evaluation will assess the building's current level of historical integrity, as well as how much historic fabric remains. If the adaptation is carried out it must be determined how much of the existing integrity will be preserved. The elements should be categorized as those retaining extensive significance and must be preserved, those that should be preserved if possible, and those which cannot be preserved due to extensive damage. Ultimately it must be determined whether or not the space can accommodate the proposed use without destroying the building's historical integrity (Murtagh, 2006, p. 101).

However, defining integrity is at the heart of preservation as a humanistic endeavor (Murtagh, 2006, p. 101). Because integrity is a subjective term, how it is lost or retained can be difficult to determine without a set definition. W. Brown Morton, who helped develop the U. S. Secretary of Interior's standards and guidelines in 1977, defines historical integrity as "those qualities in a building and its site that give it meaning and value" (as cited in Murtagh, 2006, p. 101). According to Morton for a building to have integrity, some or all of the following attributes must be present: (1) style, (2) workmanship, (3) setting or location, (4) materials, (5) building type or function, and (6) continuity" (as cited in Murtagh, 2006, p. 101).

Benefits of Preservation. In the past, preservationists lobbied for the preservation of a building mostly based on the historical significance of that site. However, not everyone appreciates the mere historical significance of a site; they must be convinced of the other benefits of historic preservation. A case study in Louisville, Kentucky found that preservation efforts had a positive effect on job creation, property values and environmental

stewardship (Gilderbloom, Hanka, & Ambrosius, 2009). A 1975 conference sponsored by the National Trust for Historic Preservation had similar findings; preservation has a positive effect on property values (1976). Randall Mason, historic preservation professor, comments that preservation is now a “means to other social ends (greater sense of place, sustainable development, cultural diversity, tourism income)...as part of this transformation, economic concepts, values, goals and discourse applied to heritage have grown in prominence” (2008, p. 303). David Hamer, author of *History of Urban Places* also agrees that historic preservation in districts can strengthen communities (1998).

Heritage Tourism. The practice of visiting country houses has its own tradition. Michael Wilson, author of *The English Country House and Its Furnishings*, notes that in England the custom goes back as far as the late seventeenth century. Owners of country houses would open their homes up for visitors to tour typically only when they were not in residence. Wilson states, “nowadays he [the owner] is quite often present in the entrance hall to greet us, and conducts us round the house himself” (1978, p. 11).

Tourism has played a significant role in the preservation movement. Many historic buildings have been restored and opened to the public as a tourist destination in order to share the educational value of the building and generate an income for the building’s maintenance costs.

The bond between old buildings and tourists is absolute and venerable. Think of any famous city in the world and you view a mental slide show of the characteristic look of the buildings vernacular to that place from an earlier time. Tourists have helped revive or save many a building or neighborhood that was ready to be discarded by locals (Brand, 1994, p. 94).

House museums such as the Biltmore estate in the United States attract tourists which in turn improves spending in the local economy. The Biltmore, located in Asheville, North Carolina,

USA, has adopted a philosophy of private preservation, but by 1985 also “contributed \$350 million to the local economy in terms of employment and tourist revenue. This is the result of creative marketing, imaginative business strategies...careful husbandry of resources and huge investments” (Covington, 2006, p. xii).

The *Chartered Surveyor Weekly* reported that in 1988 visitors to Britain’s house museums, including country houses, generated £7,850 million [\$12 billion] in income (as cited in Brand, 1994, p. 94). In America, the 1,000 house museums with a budget over \$50,000 were estimated to generate \$6 billion nationwide. This figure does not include 4,000 smaller house museums (Brand, 1994, p. 94).

Preservation, house museums and heritage tourism are mechanisms that ensure the long-term stewardship of a building. While a building’s preservation is important, inviting the public to explore history and architecture is at the heart of the house museum’s mission. A connection with the public is one way a house museum stays relevant to the community and generates funds to further maintain a building that has been entrusted to the historic site manager’s care.

Santa Fe, New Mexico offers an interesting case study of heritage tourism. While there have been many shortcomings in the formation of Santa Fe as a tourist destination, it is important to point out that as a tourist destination they have been successful; as a historically accurate, racially and culturally sensitive community they have not. The combination of the arts, architecture, public pageantry, romantic literature and historic preservation create what Chris Wilson, author of *The Myth of Santa Fe: Creating a Modern Regional Tradition* considers the myth of Santa Fe. A myth because it is based on half truths, but also because it has “provide(d) a unifying vision of the city, its people and their history, and that has fostered

one of the most active art and myth-making centers in the United States” (C. Wilson, 1997, p. 8).

The Museum of New Mexico, the artist community, as well as political entities were all proponents of this romanticized image of Santa Fe and the formation of the “Santa Fe style” based on an artistic interpretation of pre-modern Santa Fe. In doing so, the culture of the Pueblo was embraced, but the people of that culture were rejected. Wilson gives the example of the Pueblo Indians being allowed by the federal Indian Bureau to participate in the Santa Fe Fiesta, because of the educational and cultural nature of the event, however they were discouraged from dancing as a part of their own personal religious life (1997, p. 206).

With the new definition of a Santa Fe style, the U.S. historic preservation movement of the early 1900s was embraced in Santa Fe, New Mexico. Instead of creating house museums and focusing on the preservation of individual buildings, Santa Fe focused on creating a broader historic district in order to attract tourists. Wilson points out that while Santa Fe has been a successful tourist destination; success has come at a cost to the native Pueblo, Mexican and Spanish cultures of the area (Rothman, 1998). Wilson concludes with the challenge that it is, “our job...to overcome historical amnesia, challenge ethnic and tourist stereotypes, develop a sustainable economy, revitalize community, nurture myths worth believing and foster a more humane society to pass on to coming generations”(C. Wilson, 1997, p. 329).

House Museums. A house museum, according to the National Trust for Historic Preservation, is “a museum whose structure itself is of historical or architectural significance and whose interpretation relates primarily to the building’s architecture, furnishings and history” (as cited in Murtagh, 2006, p. 63). According to this definition, a house museum is a

form of adaptive use, as the structure is no longer providing housing for a family, although it does represent its original purpose. Generally the house is preserved to its original form or to a date significant in the owner's life. Measures are taken to "depress the rate of wear and tear on the building...by controlling where the visitors walk and what they touch to prolong the life of the structure and its contents to the maximum extent" (Murtagh, 2006, p. 6). When properly interpreted, either through trained docents, an audio guide or a comprehensive brochure, a house museum can teach the public lessons about the history of the occupants, their habits, their tastes and their times (Murtagh, 2006, p. 63). Based on the low attendance figures of American house museums, "most historic house museums are locally significant, with real meaning only to community members" (D. A. Harris, 2007, p. 4). Harris argues that the reliance on revenue from a broad range of national visitors has created a crisis in terms of long-term sustainability.

In America, the push toward the creation of house museums really constitutes the beginning of the preservation movement. Beginning in the nineteenth century, the house museum developed as a way of preserving buildings that were important to American history (Murtagh, 2006, p. 64). It was evident that the relationships among objects in a historic room setting were essential to bringing history to life and educating the public. "A historic room, like a house museum, is essentially a three-dimensional historic document that exists (or has been re-created) to teach a history lesson" (Murtagh, 2006, p. 65).

William Sumner Appleton helped develop standards of contemporary preservation practice through the medium of the historic house and the historic room. Appleton's Society for the Preservation of New England Antiquities, founded in 1910, developed a network of historic house museums throughout New England, which were centrally managed from

Boston (Historic New England, 2011). His dedication and work gave the historic house museum field a scholarly foundation in material culture, the history of the common man (Murtagh, 2006, p. 85), and brought the field into the twentieth century. It was his belief that house museums were of equal value as written documentation (Murtagh, 2006, p. 64).

Today's broadly accepted standards of professionalism on how one treats such building in the restoration process own their basis to Appleton, whose philosophy, in turn, was inspired by John Ruskin. Appleton was meticulous in keeping the old house as intact as he possibly could in the restoration process and aimed to preserve *in situ* at all costs. His main concern was the integrity of aesthetic quality. He would thus retain all original interior finishes and wallpapers where possible (Murtagh, 2006, p. 65).

House museums bring architecture of the past to life by inviting the modern-day visitor to explore and learn and this operation provides continued use and preservation to buildings important to our past. Establishing a house museum requires change and adaptation to the historic house, but in successful cases it provides for the long-term existence of the historic house.

Historic Site Stewardship. Stewardship is the responsibility to manage something entrusted to one's care. In terms of historical stewardship, William Morris advised that,

These old buildings do not belong to us only; that they have belonged to our forefathers, and they will belong to our descendants unless we play them false. They are not in any sense our property, to do as we like with. We are only trustees for those that come after us (as cited in Institute of Contemporary Arts, 1984, p. 155).

This adds the element of long-term sustainability to the definition of historical stewardship; suggesting that not only should we take responsibility for these historic sites now, but we should also be concerned with their existence in perpetuity.

The most basic definition of historical stewardship focuses mostly on the long term care of buildings, landscapes and collections, but this fails to recognize the human element.

James Vaughan states that,

Meticulously preserved buildings, beautifully restored landscapes, carefully researched period rooms and dutifully catalogued collections will not ensure a site's survival if no one visits. In the end, we will fail as stewards of these sites if the public is not as passionate about their survival as we are (2008b).

The English Heritage asserts that “very few significant places can be maintained at either public or private expense unless they are capable of some beneficial use” (2008, p. 43).

The greatest challenge in the historical stewardship of historic sites is not the actual preservation of the site, although it can be a financial burden, but the outdated thinking of the heritage tourism business model, the lack of local community engagement necessary to make organizations relevant and sustainable, and ill-fitting professional standards and practices derived from the museum field. It is suggested that “historic properties are on the verge of a golden age” as Americans “turn to historic houses and sites as a source of learning, enjoyment and fulfillment” (Durel & Durel, 2007, p. 7). This is encouraging news for historic sites; however it will require some organizational changes to reap these benefits. This will only happen for historic sites who transform their organization to begin thinking in terms of members rather than visitors, ‘us’ rather than ‘them’, facilitation rather than interpretation and start to include a spiritual element in addition to the intellectual and social experience (Durel & Durel, 2007, p. 7).

The New-York Historical Society should be a warning to all museums and historic sites that continue to operate in this outdated model. This non-profit organization with a long history and an extensive collection struggled for many years before having to close its doors in 1993 due to a financial crisis. Kevin Guthrie's *New-York Historical Society: Lessons from*

One Nonprofit's Long Struggle for Survival, identifies the Society's crippling mistakes as: collections mismanagement, lack of conservation and preservation, insufficient facilities, strained relationships with the public and local community, a split mission, poor governance and misuse of endowment funds (1996).

Rethinking the sustainability of the heritage tourism business model is the first step toward increasing the relevancy of historic sites. The heritage tourism business model focuses on attracting out-of-town guests and relying on admission costs and gift shop sales to fund the site's operating costs. However the funds earned from admission and gift shop sales have never been enough to cover operating expenses. This often results in staff spending time on other fundraising tactics that, may or may not, be related to the mission of the organization. Tourism in general is also declining, meaning there is less admission revenue coming in and more time spent on non-mission related fundraising (Durel & Durel, 2007). This model puts an emphasis on attracting a high quantity of non-local visitors who, due to geographical distance, are not likely to be repeat visitors.

Findings from the Forum on Historic Site Stewardship in the 21st Century, held in April 2007 at Kykuit, New York, also concur that "serving the needs of the local community, (not the tourist audience) is the most valuable and most sustainable goal for most historic sites" (Vaughan, 2008a). This suggests, and Falk and Sheppard agree, that the number of visitors is not the most important measurement of success, but the quality of the visitors experience (2006).

A new model focused on affinity groups will lead to more meaningful community engagement and the possibility of repeat visitors (Durel & Durel, 2007, p. 9). Within this new model, membership programs are formed so that the organization can support its

members rather than the previous model of the members supporting the organization. This new model gives much more shared authority to the members and allows them to influence the direction of programs and activities that they are interested in. The Kykuit findings recommend that sustainability begins with a site's engagement with its community and a willingness to change its structure, programs and services in response to the changing needs of that community.

A key question in evaluating an organization's relevancy and degree of community engagement is, "If your institution would close tomorrow, would anyone care or notice?" This model and the subsequent changes it brings are grounded in the idea that historic sites have priceless resources that can be utilized in new ways in order to enrich peoples' lives. Historic sites should assess their local community's needs and begin to develop ways in which they can meet those needs in order to develop community engagement. The Jane Addams Hull-House Museum located in Chicago, Illinois, has embodied the social reforming spirit of Jane Addams in order to connect to their local community. The museum maintains and preserves the original Hull-House site for "interpretation and continuation of the historic settlement house vision, linking research, education and social engagement" (Jane Addams Hull-House Museum, 2009). The Jane Addams Hull-House has increased its relevancy to its local community through a variety of programs related to food education. This includes the Hull-House Museum Heirloom Farm providing urban farm-centered education.

The affinity group model definitely requires the historic site organization to try new things. This may be uncomfortable to those who have become accustomed to the prior, outdated professional standards and practices and assumptions about the ability to be economically sustainable through admissions. While both the museum and historic site

management professions value presenting and interpreting history to the public, these practices do not fit the historic site field and can limit the creativity and long-term sustainability of historic sites (Vaughan, 2008a). When success is defined as meeting these standards, it “forces [historic sites] into a mold, pushes their focus away from their audiences and communities, makes them formulaic” (George, 2002, p. 2). The development of new standards of stewardship for the historic site field is needed.

Historic sites operate under different circumstances and objectives than purpose-built museums. The goal of many historic sites is to offer an interpretive experience by displaying artifacts, including buildings and landscapes, in their original context. Vaughan suggests that treating each artifact as a priceless artifact, a practice stemming from the museum community, is not practical for a historic site (2008b). He suggests that perhaps there should be graduated levels of significance given to historic site collections so that the extremely rare and significant pieces could be protected, but the more commonplace pieces could be utilized to give a more a unique experience to the visitor. His concern is that limited resources are going toward accurately creating period rooms with little consideration to how visitors will benefit from this effort. The focus of the new standards of historic site stewardship should relate to the visitors’ experience and to creating a sustainable balance between the preservation of landscapes, buildings, collection and local community engagement.

In her book *New Solutions for House Museums: Ensuring the Long-Term Preservation of American’s Historic Houses*, Donna Ann Harris presents eight solutions to house museums. She notes, “while it is a noble objective to save a building for the public good, museum use is not necessarily the best conclusion for every hard-won preservation battle” (2007, p. 4).

House Museum Reuse Solutions	Study House (HHM use)	Mission-Based use. (non-HHM use)	Co-stewardship Agreement. (HHM use)	Merge with new HHM (HHM use)	Lease for Adaptive Reuse (non-HHM use)	Sale to Private Sector with Easement	Sale to nonprofit with easement	Donation to government or nonprofit with easement
Building Conditions								
Restored/well maintained	***	***	***	***	***	***	***	***
Restored/some Deferred Maintenance	**	***	**	**	**	**	**	**
Restored/major Deferred Maintenance	*	**	*	*	*	*	*	*
Partly restored/well maintained	*	**	**	**	**	**	**	**
Partly restored/some Deferred Maintenance	*	**	**	*	*	**	*	**
Partly restored/serious Deferred maintenance	*	*	*	*	*	*	*	*
Unrestored/ well maintained	*	**	*	**	*	**	*	**
Unrestored/some Deferred Maintenance	*	*	*	*	*	*	*	*
Unrestored/ serious Deferred Maintenance	*	*	*	*	*	*	*	*

Figure 6. Reuse options based on the condition of the historic house museum building (D. A. Harris, 2007, p. 100). Permission granted by AltaMira Press.

Harris' solutions are reactions to the problems of house museums operating in the old model of cultural heritage tourism. Her solutions are only in response to a failing house museum, rather than finding a creative, pro-active use for a historic building. The majority of her solutions do not involve the continued interpretation of the house, but instead another use. Harris is correct that not every historic home can be maintained as a house museum. The literature reveals more creative and proactive options for historic buildings to be centers of education and relevant to their communities.

Harris' solutions should suggest that instead of rescuing historic house museums, we should be questioning the creation of house museums. Carol Stapp and Kenneth Turino state, "the unassailable answer in the past – let's turn it into a museum – is no longer automatically regarded as the right response" (Stapp & Turino, 2004, p. 7). Instead, Richard Moe, former president of the Nation Trust for Historic Preservation believes it is more important to find a solution that "best addresses the long-term interests of the property and the community" (2002, p. 11).

Preservation in England

Brand considers preservation to be "a national pastime in England (1994, p. 95). It is a country that is deeply rooted in its history, culture and sense of place.

Both tourist and natives can explore the landscape, not confined to the occasional cathedral or Tower of London. Everywhere they prowl are buildings that still work for a living, richly textured, expert at being exactly where they are and what they are, visibly cherished (Brand, 1994, p. 95).

The English National Trust (ENT) is now the largest private landowner in the country, with ownership of one percent of Britain's total land and ten percent of its coast; administering 200 country house estates, most of which were acquired through the 'Country House

Scheme' (Brand, 1994, p. 95). Murtagh regards ENT as "perhaps the best established program of property stewardship in the world" (2006, p. 73).

The Development of the English Country House. During the eighteenth and nineteenth century the English country house was the "center of a way of life to which nearly all the lands of England outside of towns were subject" (J. Harris, 1985, p. 9). The country house was more than a large home in the country for the wealthy, it was a "means of organizing power (thus have they been called power houses) with a complex and cellular structure more or less self-supporting and often physically shut-off from the surrounding country by a park wall" (J. Harris, 1985, p. 9).

The term 'country house' refers to the fact that most owners of country houses also had a home in London, making their country house their part-time second home. The family of a country house would employ a large staff to maintain the interior of the home as well as the extensive gardens and farms. This made country houses vital to local economies as the main employers of the locals. Smaller medieval country houses were originally homes of yeomen or small farmers, while larger homes belonged to the local landowners and the lords of the manor, known as squires (M. Wilson, 1978, p. 11).

Until the nineteenth century the wealth and population of England lay in the country rather than the towns; therefore anyone who had made money by any means, and was ambitious for himself and his family, automatically invested in a country estate (Girouard, 1978, p. 2). People did not live in country houses unless they had power, or aspired to gain power and felt a country house would aid them in that pursuit (Girouard, 1978, p. 2). Power was based on land ownership because they could rent the land to their tenants to earn a profit. Tenants became an asset for the landowner, as they were required to show loyalty fight for

him in the early days of country houses, or vote him into Parliament. Connections with prosperous landowners were highly sought after and marriages with heiresses were ideal as this offered the descendants leverage for more jobs and privileges. This was the preferred route to power and led to broad estates, a peerage and the establishment of a dynasty (Girouard, 1978, p. 2).

According to Mark Girouard, a British architectural writer and country house authority, country houses were built to display the owner's power and wealth.

It was a show-case, in which to exhibit and entertain supporters and good connections. In early days it contained a potential mystery or success around its owner. It was visible evidence of his wealth. It showed his credentials-even if the credentials were sometimes fake. Trophies in the hall, coats of arms over the chimney-pieces, books in the library and temples in the park could suggest that he was discriminating, intelligent, bred to rule and brave (1978, p. 3).

Looking at Britain today, we know that this type of lifestyle and these homes did not last. The inevitable demise of the English country house was soon to come.

The English Preservation Movement. As England moved into the Industrial Revolution the structure of society shifted the power to the cities rather than the country, lessening the importance of country houses. The expansion of cities led to the destruction of historic streets and buildings. This pushed preservation theorists to realize the frailty and importance of ancient buildings. These men recognized that once lost, historic integrity could not be replaced and with so many historic buildings already damaged, they led the call to action and started the British preservation movement (Williams, et al., 1983, p.6). The movement began as a response to these changes with the Ancient Monuments Protection Act of 1882 which listed 29 monuments deserving of protection, including Stonehenge. The monuments were listed in the schedule of the Act. This is why listing a historic building or

structure is now known as “scheduling a monument” (Williams, et al., 1983, p. 26). Once eligible for scheduling a site or building of cultural, historic or artistic values could not be modified without authorization from the government.

The Ancient Monuments Protection Act of 1900 furthered the Act of 1882 by also including medieval buildings as well as prehistoric remains. Both the Act of 1882 and 1900 only included extremely national significant buildings that the government would assume financial liability for their preservation and maintenance. In 1921, an additional 139 monuments were included.

The devastation of World War II increased public concern for saving ancient monuments in Britain from destruction. In order to further protect these historical treasures,

a provision was therefore inserted in the Town and Country Planning Act of 1944 enabling the newly-constituted Minister of Town and Country Planning to prepare, for the guidance of the local planning authorities, lists of buildings of special architectural or historic interest (Garvey, 1983, p. 27).

This established the system of categorizing historic buildings by three grades reflecting the historical value of the building or monument.

In 1984, the preservation efforts of the Ministry of Works, the Historic buildings Council were streamlined into a new organization, the English Heritage. This quasi-governmental agency or ‘quango’, “has the task of identifying and protecting this inheritance in England. . .by listing-recommending buildings for inclusion on statutory lists of buildings of ‘special architectural or historic interest’ compiled by the Secretary of State for Culture, Media and Sport” (English Heritage, 2011). The English Heritage categorizes the grades as Grade I meaning the building is exceptional, Grade II* (referred to as Grade II star), the building is particularly important and Grade II those of special interest (English Heritage, 2011). The English Heritage is the government’s statutory advisor on the historic

environment and encourages the public “to understand, value, care for and enjoy their historic environment” (English Heritage, 2012).

The Demise of the English Country House. English country houses did not feel the same effects of the Industrial Revolution until the turn of the twentieth century. Many English country houses, once home to the elite, were abandoned due to the high expense of upkeep, the lack of heirs, increased taxation and the results of World War I. Most were destroyed. English country houses remaining have had to adapt to survive. Some became house museums, and others were adaptively-used as schools or for other institutional uses (Martin, 1985). The preservation movement of the late nineteenth century fostered English society’s appreciation for historic buildings and made the preservation of country houses possible.

The English National Trust (ENT) developed its ‘Country House Scheme’ in 1936 as a response to the burdens placed upon country house owners in the early twentieth century. An organization founded in 1895, the ENT was “set up to act as a guardian for the nation in the acquisition and protection of threatened coastline, countryside and buildings” (National Trust, 2011). The ‘Country House Scheme’, developed with the assistance of Lord Lothian, allowed the owners of country houses to bequeath their homes to the ENT along with an endowment, either land or capital and the transaction would be free of taxes, as the ENT is a charity organization (National Trust, 2011). The ENT could then use the money from the endowment to provide for the maintenance of the fabric of the building, its contents and gardens. In many cases the ENT also provided for the donor and their heirs to continue living in the house without rent, as long as they allowed the public to view the house and the gardens (Garvey, 1983, p. 28). This released the homeowner from the burden of the increased

cost of upkeep to the home as well as inheritance taxes. It also saved the property for the continued enjoyment and education of the public.

Legislation prior to 1953 only prevented the demolition of historic monuments, but had not provided for maintenance costs. As many country houses began to struggle under new inheritance taxes and the high costs of maintenance, they were in need of financial assistance in order to remain. The Act of 1953 allowed the Minister of Works to make grants toward the maintenance of buildings with outstanding historical interest under the condition that the public was given limited access to the building (Garvey, 1983, p. 28).

Examples of Country Houses. Moggerhanger and Strawberry Hill are two examples of English country houses that have been adaptively used since the turn of the twentieth century. The conditions of the restoration at both of these sites are very similar to the conditions at Stowe House as each project involves multiple partners and public grants to fund the restoration.

Moggerhanger is an English country house turned into a hospital in the early twentieth century. Harvest Visions a Christian organization bought the estate and agreed to allow it to be restored while they continued to use the facility. The Heritage Lottery Fund (HLF) funded the restoration with £3.5 million. The World Monuments Fund Britain through the Robert W. Wilson Challenge Fund also contributed (McGhie, 2006).

Strawberry Hill, located in London, is a Grade I listed property, and has been identified as in urgent need of restoration. Once home to Horace Walpole it is now St. Mary's University College. It was also included in the 2000 World Monuments Fund Watch list of the world's *100 Most Endangered Sites*. The Strawberry Hill Trust was formed in August 2002 to restore the eighteenth century Gothic villa, and open it to the public.

Strawberry Hill involves complicated leases between the owner/tenants and the preservation trust. Just recently the Trust has taken over a 120 year lease from the Catholic Education Service, and is beginning a £8.9 million project to restore the house and surrounding gardens. Strawberry Hill has also benefited from Heritage Lottery Fund grants to complete portions of the restoration (Strawberry Hill Trust, 2011).

Stowe House

Architectural Description. The symmetrical South Front of Stowe House consists of five sections. The central block, two shorter, recessed, seven-bay sections on either side of the central block connect to the end pavilions, each three bays wide and equally as tall as the central block. The construction material used is golden limestone from Northamptonshire and Oxfordshire (Pevsner & Williamson, 1994, p. 665). Along the basement level, spanning the length of the building, there are evenly ranked rounded arch windows. A balustrade stands atop the roof line.

The central block has a pediment portico, supported by six massive Corinthian columns. A wide flight of steps leads to the entrance to the Marble Saloon (see Figure 7). Within the South Loggia, there is a Bacchic relief by James Lovell (Pevsner & Williamson, 1994, p. 666) (see Figure 8). The bays on either side of the portico have large, tripartite windows, each 12 over nine, that are separated by Ionic pilasters each topped by a rounded arch and a centered medallion. On either side of the window stand Corinthian pilasters, one toward the center and two on the ends with centered festoons between them. The shorter, recessed sections exhibit seven evenly ranked nine over six windows with Ionic columns placed between each.



Figure 7. Central block of South Front of Stowe House.



Figure 8. Section of the Bacchic relief by Lovell within the South Loggia.

The Eastern and Western Pavilion follow a similar style as the central block. The arched window segment from the central block is repeated three times on each pavilion. The

series of arches is separated by four Corinthian pilasters with festoons between each pilaster. A balustrade follows the line of the roof. Centered on the balustrades of each pavilion are sculptures by James Lovell expressing the Temple family's politics. On the Western Pavilion, Religion and Liberty are depicted and on the Eastern Pavilion, Peace and Plenty are depicted (Pevsner & Williamson, 1994, p. 665).

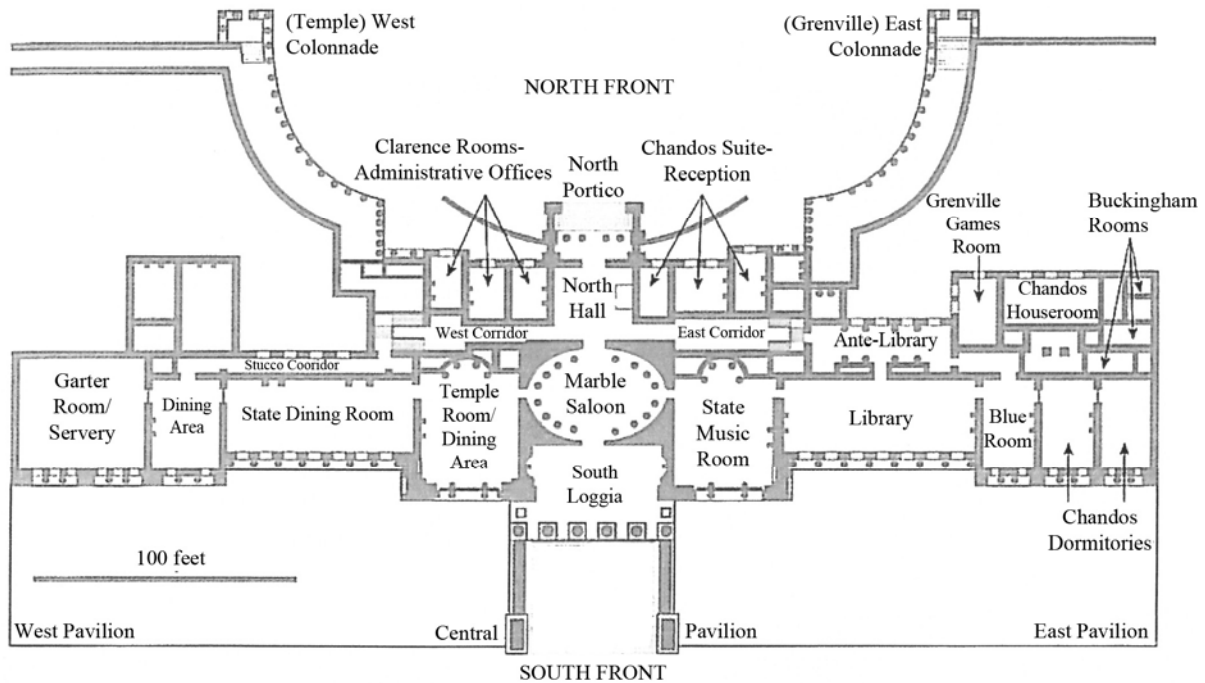


Figure 9. Present day floor plan of the piano nobile of Stowe House. Adapted from *Stowe House*, by Michael Bevington, 2002.

The piano nobile, the principle floor, of Stowe House, contains all the state rooms of the home which are the rooms along the present day visitors' route. This includes the following rooms: North Hall, Marble Saloon, State Music Room, Library, Blue Room, Temple Room, State Dining Room and Garter Room (see Figure 9).



Figure 10. Interior of the Marble Saloon.

The feature room of the Stowe House is the centrally located Marble Saloon (see Figure 10). This entrance hall's design was inspired by the Pantheon in Rome. The elliptical room has an impressive domed and coffered ceiling with a central oculus. Each plaster coffer features a rosette design. The height of the dome is 56 feet, seven inches. There are 16 scagliola (a faux marble created using a mixture of plasters) columns surrounding the room. Twelve niches spaced between the columns hold eight copies of classical statues and four copies of Egyptian-styled torchères. Above the Roman Doric entablature, there is a high-relief plaster frieze surrounding the entire room, representing a Roman triumphal procession and sacrifice (Bevington, 2002, p. 36) (see Figure 11).

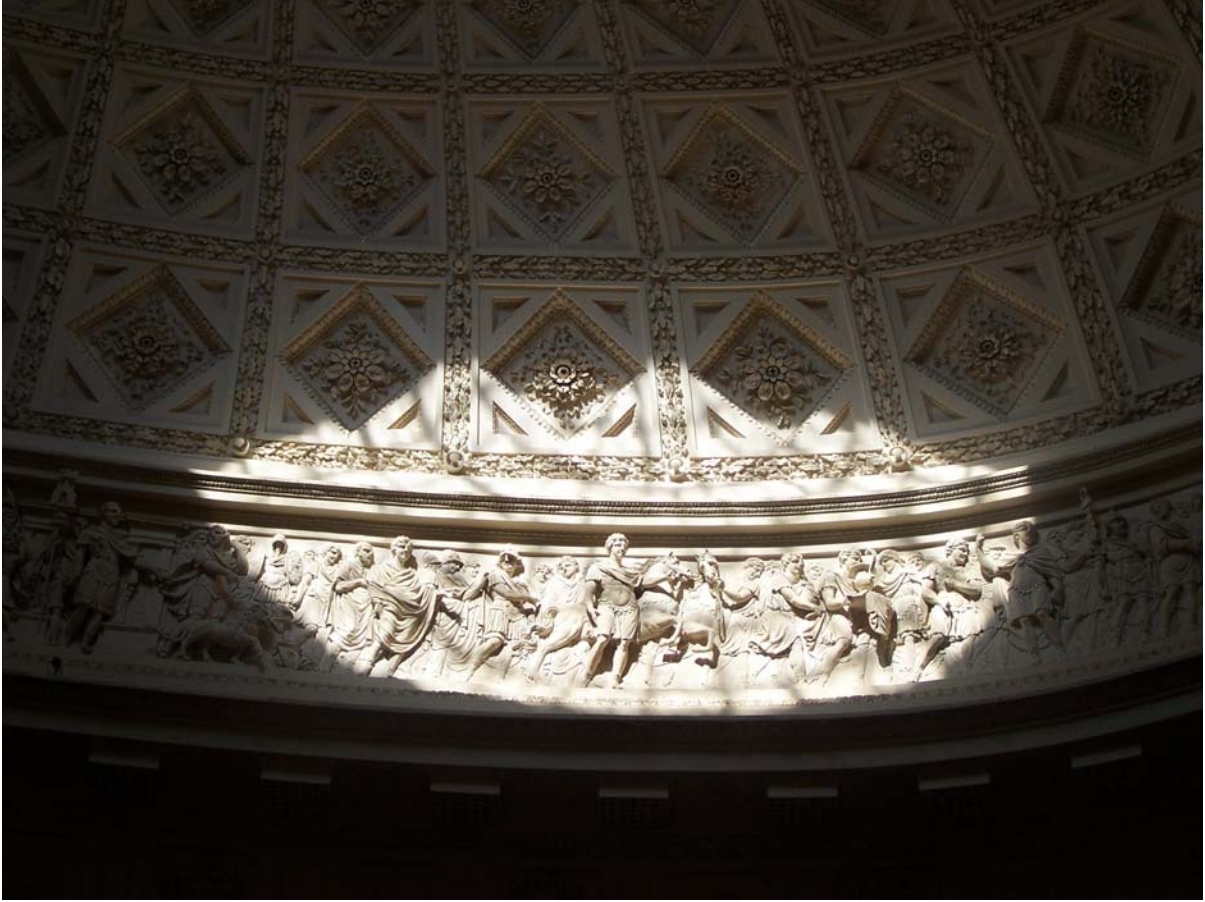


Figure 11. Detail of Roman frieze and coffered panels of Marble Saloon.

History. As an English country house that once faced the possibility of destruction, Stowe House located in Buckingham, England has been adaptively used as the home of Stowe School and now a house museum. Currently Stowe is undergoing a six-phase restoration process.

The Temple-Grenville family owned Stowe House from 1589-1921. The Temple Grenville's began their rise to political esteem and wealth as sheep farmers and rose up through the ranks of British politics and aristocracy over a period of two hundred years. During that time the family made significant contributions to British politics, producing multiple members of Parliament and four Prime Ministers. Stowe was the visible evidence of the family's new wealth and standing in society.

The architectural history of Stowe House is just as interesting as the family's rise to power. The central block of the house was built from 1677 to 1683 for Sir Richard Temple, third Baronet, designed by William Cleare. It was a brick structure with stone, quoins and tiled roof, 13 bays in length and four storeys high. This design is still slightly evident in central portion of the current house (Pevsner & Williamson, 1994, p. 663). As the family increased in rank improvements and additions were made to the family home. Sir Richard Temple, 4th Baronet, Viscount Cobham (1675-1749) employed Sir John Vanbrugh to extend the house c. 1720 and make additions to both fronts. He had the house limewashed and in 1728-1730 rebuilt the North Hall, adding "the portico and the short square towers" (Pevsner & Williamson, 1994, p. 664). Earl Temple (1711-1779) engaged Giovanni Battista Borra to attempt to create unity on the unharmonious South front beginning in 1752 (Pevsner & Williamson, 1994, p. 664). Robert Adam redesigned the South Front in 1770-1771. His design was amended and executed in 1772-1774 by Thomas Pitt and Lord Camelford (Pevsner & Williamson, 1994, p. 665). This resulted in the façade that exists to this day (Bevington, 2002, pp. 11-13).

The competition between the Grenvilles of Stowe and the Verneys of Claydon, another prominent family with a country house in Buckinghamshire, is an example of the role of architecture in establishing political power. In the 1760s Lord Verney challenged the Grenvilles for the political leadership of Buckinghamshire. A part of Lord Verney's campaign to gain power was renovations to his home Claydon. In an attempt to keep up with the improvements at Stowe, Lord Verney outreached his means. His campaign ended in bankruptcy, the demolition of his new building and the continued political leadership of the Grenvilles (Girouard, 1978, p. 4).

The extravagant spending of the family to create a palace and display their wealth through their home and gardens produced the splendor that is Stowe; however it also left the family with extensive debts. The second Duke of Buckingham and Chandos (1797-1861) redesigned the State Rooms on the piano nobile, the principal floor, of Stowe, specifically for the expected visit of Queen Victoria and Prince Albert. The royal couple finally made their visit in 1845. At this time, the Duke was £1.1 million in debt (Bevington, 2002, p. 19). In order to cover the debts of the second Duke, the contents of Stowe were sold during “The Great Sale of 1848.”

The Stowe estate and the Temple-Grenville family never quite recovered from the Sale of 1848 and the estate was sold in 1921 to Harry Shaw. Shaw intended to open the house to the public, but did not have the means to restore it himself. He therefore sold it to Allied Schools Foundation, who then founded Stowe School. Stowe School opened on May 11, 1923 in Stowe House as a boarding school for boys. Sir Clough Williams-Ellis was the architect responsible for adapting Stowe House and the grounds from a home into a school. J.F. Roxburgh, the first headmaster of the school, had a novel teaching philosophy; he valued each student individually along with their unique talents and abilities. He also believed that the beautiful setting of Stowe should be an inspiring influence on the students and that every pupil would leave Stowe, “knowing beauty when he sees it all his life” (Bevington, 2002, p. 23).

Roxburgh’s educational philosophy has continued to guide the school. A unique visual education program is offered to first year students at Stowe. This course introduces the students to the history of Stowe House and teaches them basic architectural terms, fostering a general appreciation for their surroundings. Not only does this course give the students a

sense of responsibility for caring for the home they will be living in for the next six years, it is intended to instill an appreciation and awareness for the important role art and architecture play in our daily lives.

While Roxburgh recognized the value and beauty of the Stowe estate, Stowe School could not continue to afford the maintenance of the house, gardens and many monuments throughout the gardens. Efforts by students and alumni were undertaken throughout the mid-twentieth century to raise funds to maintain the House and restore the garden monuments. It proved to be too much for an educational organization to keep up with. In 1989, the school gave the Stowe Landscape Gardens to the English National Trust (ENT) for restoration. The ENT was not able to take on Stowe House because there was no endowment to accompany its transfer of ownership. The ENT continues restoration of the gardens, and has opened them to the public. Although the school does retain the lease to certain areas the students, faculty and parents are permitted to use the Gardens.

As an educational organization, Stowe School was not eligible for preservation grants by the government and other organizations. Therefore, in order to ensure the restoration and continued existence of Stowe House, the Stowe House Preservation Trust (SHPT) was formed in 1997, its purpose “to restore and preserve Stowe House for the benefit of the nation and the public”(Bevington, 2002, p. 26). The SHPT now owns Stowe House on a ninety-nine year lease, though the school still retains use of the building as tenant.

A six-phase restoration project of Stowe House began in August 2000. Completed in 2002, Phase 1 included the restoration of the North Front and the Colonnades. Phase 2, the restoration of the Central Pavilion, South Portico and Marble Saloon was completed in July

2005. Phase 3, the restoration of the Eastern and Western Pavilion and the State Library, was just recently finished in the fall of 2011.

Along with the restoration of Stowe House, Stowe House Preservation Trust (SHPT) has also been charged with managing public visitation to Stowe House. The public monies that have been awarded to the restoration of Stowe have brought increased responsibilities to open Stowe to the public for tours and visitor education.

Interestingly, many of the rooms at Stowe are still being used for their original purpose, but on a much larger, and more demanding scale. The Music Room still holds weekly concerts and students eat all three meals in the State Dining Room. Now, instead of being home to a single family and their guests, it is the central building on a campus housing 700+ students and staff.

Stowe represents a typical English country house with a rich family history. Like other country houses it faced demolition during the 1920s. Stowe is an interesting case because it was first adaptively used as a school and is now being restored and operating a house museum. Stowe's three partner management system presents an interesting way of approaching historic site management that will be further discussed in this research project.

Summary

Early preservation theories provide a framework for dialogue concerning the best practices of preserving our historical treasures. There has been continued debate over the most appropriate approach leading up the present day. Murtagh points out that,

As preservation grows in scope and influence, the need for commonly held definitions grows apace. Given the difference in intellectual human thought and opinion illustrated in the quotations from Morris, Ruskin, and Viollet-le-Duc, it is clear that preservation is basically a humanistic endeavor (2006, p. 4).

Preservation professor and author, Norman Tyler agrees that the various perspectives of those involved in preservation, “whether the viewpoints are represented by Violett-le-Duc versus Ruskin, or Johnson versus Venturi, such dialogs are important to keeping the preservation movement alive” (2000, p. 32).

The Kykuit conference was a pivotal step toward recognizing the need of historic sites to be relevant to their community and the development of new standards specific to the management of historic sites. As the historic sites professional community continues to move toward this new model of operating, there will need to be experimentation in methods and the understanding that experimentation is okay. Visitors and the local community will need to be kept at the heart of every decision as historic sites begin to change the focus of their missions from the past to the future in order to be successful stewards of the historic sites they manage.

Those country houses that survived the early twentieth century but did not become house museums have been acquired by a range of institutions including; preparatory and public schools, holiday rentals, training colleges of various kinds, convents and religious seminaries, hospitals, nursing homes, homes for the elderly, mental institution and homes for troubled boys known as borstals. Some of these are privately run but many are operated by local authorities, health authorities or government departments (Martin 1985, p.5). Kit Martin, English architect and country house property developer, believes that houses with a very deep plan, or many large rooms benefit most from institutional use (1985, p. 8).

The literature reveals a need for historic buildings to be relevant and adaptively used in order to survive. This is especially true for English country houses, as their former use as the center of country life is no longer practical in today’s society. A country house with a

very deep plan or a considerable number of very large, grand rooms, institutional use may be the best solution (Martin, 1985, p. 5). It is obvious that the public has an interest in these buildings and they are an important part of Britain's history and current tourism market. The literature does not reveal much information about how to manage the hybrid adaptive use/restoration/house museum situation that is present at Stowe. Clearly this comes with some very specific issues and conflicts that need addressing.

The situation at Stowe presents a very interesting model of how to preserve our historic resources by both restoring and adaptively using them. This multi-use approach encourages relevancy to community needs and provides educational opportunities for the public. The complexity of the three partner management model at Stowe is not without its complications, there are improvements to be made and lessons to be learned from this arrangement.

CHAPTER III

Methodology

Purpose of the Study

The purpose of this study is to examine the diverse participant experience of the restoration process at Stowe House, Buckingham, England, as the building is being adaptively used for the purposes of Stowe School and as a house museum. The Learning History Methodology (LHM), with its requisite interviewing process, is being used as a means to record, validate and analyze various perspectives of individuals with a controlling interest in the historic property. The resulting narrative has the potential to inform future decisions made at Stowe. It may also be useful to others undertaking similar restoration and adaptive use projects.

Research Questions

The following research questions provided direction for the study:

1. What are the lessons learned from the experience of participants engaged in a site that has been both adaptively used for a modern purpose and restored as a house museum open to the public?
2. How might experiences and lessons learned by the research participants be analyzed and synthesized then used to inform subsequent projects both at Stowe and elsewhere?

Learning History Methodology

The LHM, a specific case study method, was developed at the Massachusetts Institute of Technology's (MIT) Center for Organizational Learning by George Roth and Art Kleiner in response to the needs of organizations to engage in collective reflection. The LHM was first utilized to transfer learning from pilot projects to other parts of an organization (Parent,

Roch, & Beliveau, 2007, p. 272). The Learning History Methodology (LHM) is a multi-disciplinary approach drawing from ethnography, journalism, action research, oral histories and theatre.

LHM, categorized by action research, seeks to facilitate the creative tension inherent in the relationship between action and reflection by catalyzing synergy between scholarship and practice (Bradbury & Mainemelis, 2001, p. 341). This places the importance of the LHM on producing useful interpretations rather than just accumulating more facts (Bradbury & Mainemelis, 2001, p. 341). This is a qualitative, inductive type of research, as the research is not meant to prove or disprove a starting hypothesis (Parent & Beliveau, 2007, p. 73). Change projects are particularly suited for learning histories as they are considered a learning opportunity and the LHM can help reflect, assess and evaluate the change initiative (Parent, et al., 2007, p. 272). The Learning History's intent is to allow past learning to direct stakeholders "in the dialogical generation of a new future" (Bradbury and Mainemelis, 2001).

The Learning History document is typically a 25-100 page narrative of an organization's recent critical episodes, presented in an engaging two-column format (Kleiner & Roth, 1997). The right hand column presents the relevant events through the interwoven quotations of people who took part in them as well as those who were affected by them or observed them. A variety of opinions and perspectives are included. The left-hand column includes the learning historian's analysis, and identifies current themes, asks questions and raises issues which may be difficult to talk about without being anonymous (Parent and Béliveau, 2007, p. 74) (see Figure 12).

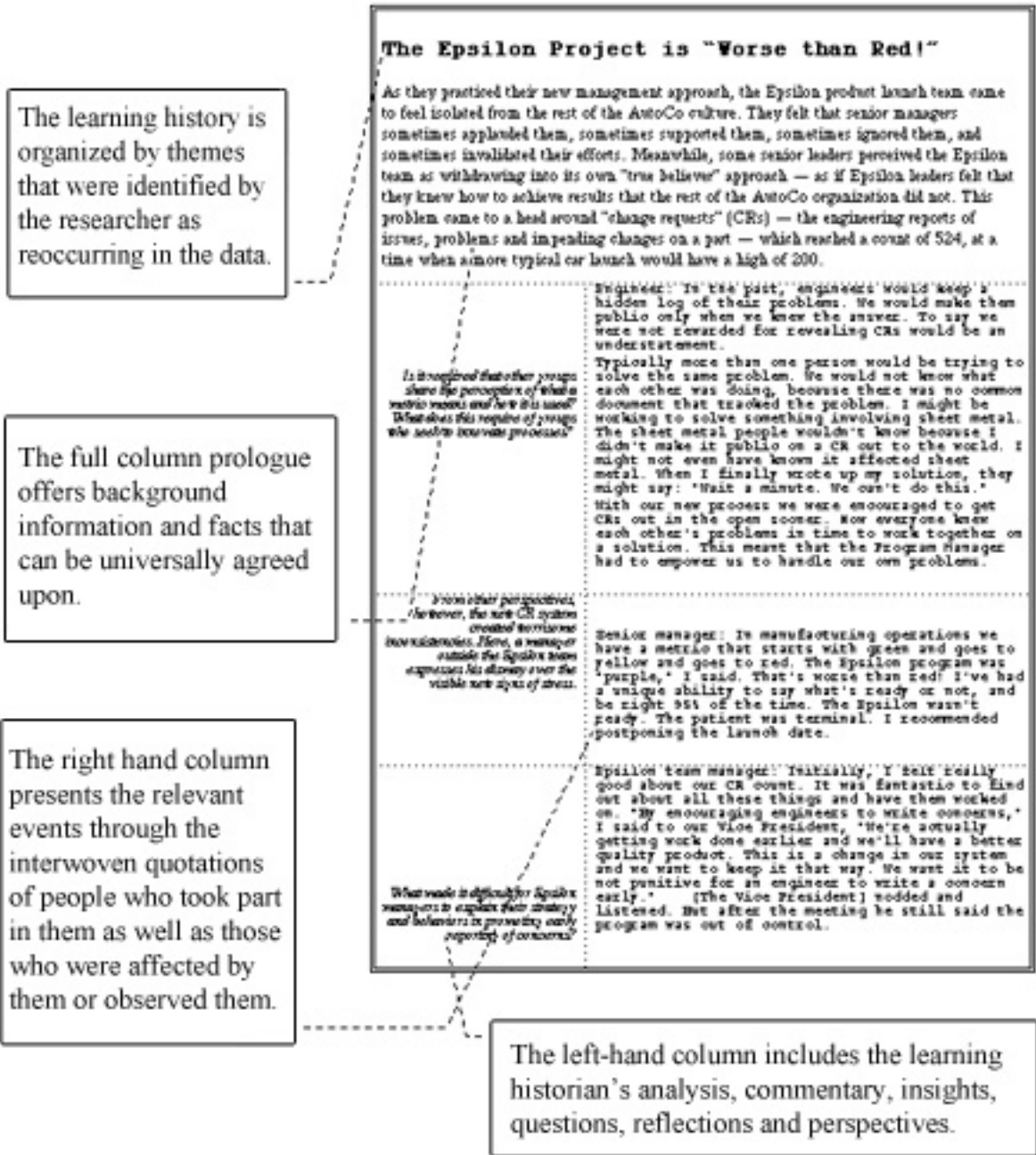


Figure 12. Visual representation of the Learning History format. Adapted from "Learning histories: A new tool for turning organizational experience into action," by A. Kleiner & G. Roth, 1997.

After interviews and researcher analysis are completed, the document is dispersed in order for those involved to further reflect and serve as a guide to others undergoing a similar project (Parent & Beliveau, 2007, p. 74). A Learning History is just as much a process as it is

a product; it reveals knowledge, analyzes it and turns it into an actionable knowledge base (Roth & Kleiner, n.d).

Benefits of the Learning History Methodology (LHM) include; making information available to the larger community of scholars and practitioners, contributing to the body of knowledge about what works and what does not in management and generating information on an organization's way of learning. The Learning History document also provides the opportunity for many other documents to be produced, such as training programs, learning tools and facilitating future research. The LHM helps people openly express their fears, concerns and assumptions which in turn help build trust and a sense of community. As a result people feel they are not alone in their efforts to improve the organization. It makes them feel that their view counts. The LHM identifies learning opportunities as well being a structured and transparent way of analyzing case study data (Parent & Beliveau, 2007, p. 75).

The challenge of the LHM is that often there is not enough support from the organization. Not all organizations fully buy into the LHM fearing the transparency that the methodology requires. Many managers and employees do not always have the time to reflect, because in a business culture, action is highly valued (Parent, et al., 2007; Roth & Kleiner, n.d).

To be successful the organizational climate has to welcome contradictions, uncertainty and conflict as learning opportunities (Milam, 2005). Participants' responses to Learning History documents are not always positive; they may feel uncomfortable with what the Learning History actually uncovers, particularly if it reveals gaps between their aspirations and their reality (Roth & Kleiner, n.d). However, this is exactly why Learning Histories have value; in their capacity to reveal multiple perspectives on issues that people

want to talk about but have been afraid to discuss openly (Kleiner & Roth, 1997). Collective reflection is the goal of all learning histories.

The Learning History Methodology (LHM) has been applied to prior projects such as *Oil Change: Perspectives on Corporate Transformation* (Kleiner & Roth, 2000) and *Car Launch: The Human Side of Managing Change* (Roth & Kleiner, 2000). Both books are a part of the Oxford series, The Learning History Library. *Oil Change* chronicled the story of major change within an anonymous, major, international oil company referred to as OilCo. The participants involved represented a wide variety of perspectives including those who worked within exploration and production, refining and retail, chemical and oil consulting. The issues that were discussed in this Learning History included business practices, corporate governance structure, team management and leadership style. The goal of *Oil Change* was to identify what OilCo had learned collectively as well as individually during this corporate change. *Car Launch* records the events surrounding an intentional change in the way a new car model could be launched at AutoCo, a pseudonym given a large automotive corporation, without “the unnecessary stress and burnout” of their employees (Roth & Kleiner, 2000, p. v).

Research Design

The goal of this research project is to construct a Learning History of the restoration and adaptive use of the Stowe Estate in Buckingham, England using first-person accounts from those directly involved. Participants were recruited from the past and present membership lists of the Stowe House Preservation Trust, involved members of the Stowe School and the English National Trust, craft and trades persons, major donors and other key stakeholders identified in the process.

This study examines, through first person narrative, participant experience in the restoration of the historic Stowe Estate over a 14 year period (1997-2011). To achieve a variety of perspectives, participants were chosen based on involvement in the restoration process. All interviews were conducted on an individual basis. Each interview was structured with several questions based on the participant's involvement. The questions were open-ended to encourage participants to tell their own story in their own way.

Participant Selection. Representative and convenience samples (n=11) of currently living and available participants in the restoration process were invited to engage in the interview process. This included, but was not limited to, past and present members of the Stowe House Preservation Trust, involved members of the Stowe School and the English National Trust, craft and trades persons and major donors. Anyone not actively contributing to the restoration of the Stowe Estate during the period under examination was not included. Potential participants were notified by email explaining the study and how the information from the study would be used. They were able to make an informed decision as to participate or not. This community of participants will remain anonymous within the dissertation and all subsequent publications (see Appendix A).

Interview Development. Once participants were identified and agreed to participate, a location and time to hold an interview was arranged by me and the participant. All interviews were voice-recorded in a private setting and will remain anonymous. Prior to the beginning of the interview, I went through the informed consent form with each participant to ensure they understood the intent of the research and all potential risks. Once the consent form was signed the interview began. The questions for the interview covered issues related

to the restoration, but were left open-ended in order to let the participant freely talk (see Appendix B).

Institutional Review Board. This research complies with the Office of Research Integrity and Compliance at West Virginia University (see Appendix C). The Learning History Methodology (LHM) requires anonymous participants to give interviews relating to their unique experience with the project being studied. In this study the experience was the restoration of Stowe House. As the LHM had not been utilized in a preservation context previously some challenges were presented in designing the research to ensure a methodical approach to collecting the data, the anonymity of participants and the confidentiality of data. Most of these challenges were discovered while submitting the research design to the Institutional Review Board (IRB) at West Virginia University. Multiple revisions were required to obtain IRB approval. Some of the issues related to the research design that were encountered during the IRB process included:

- Confidentiality- is there any way subjects can be associated with data?
- Maintaining anonymity of subjects
- Identifying and mitigating potential risks and discomforts to the subjects
- Making provisions to protect the privacy interests of the subjects
- The risk to benefit ratio of subjects' participation

The root cause of these confidentiality and anonymity issues related to the need to establish a dependable and credible research design. These issues were mitigated and the research design approved by the IRB with the inclusion of a consent form and data management plan (see Appendix D). The consent form informed participants about the purpose of the research, what is required of them and revealed any potential harm from

participating. The data management plan set a standard for how data would be collected, stored, protected and presented. A researcher generated pseudonym was created for each participant in order to protect the confidentiality and anonymity.

Design for Dependability. Dependability refers to the trustworthiness of a research design and the consistency of behaviors in that research design. It asks the question, would the data be similar if the study was replicated (Ary, Jacobs, Razavieh, & Sorensen, 2009, p. 498)? With regard to the current research project dependability refers to whether the research design provides a logical, step by step system in order to have consistent interactions with each participant, ensuring confidentiality and the dependability of the research results.

Triangulation and creating an audit trail were used to develop dependability in this research design. Triangulation, according to Mason (1996) is a way of corroborating data so that a more accurate understanding of the situation may be obtained by exploring the intersection of data such as interviews and observational data through a process of overlaying.

An audit trail allows an independent auditor to examine the study from beginning to end in order to evaluate the trustworthiness of the outcome (Ary, et al., 2009, p. 636). Thorough records were maintained during the research in order to create an audit trail. Participant interactions, signed consent forms and interview scheduling were recorded in the research journal. A data management plan was created prior to data collection. The plan outlines the types of data to be collected, data and metadata standards, policies for access to raw data, the appropriate protection of privacy rights, policies for re-use and plans for archiving the raw data. The data management plan informs and guides the audit trail.

Design for Credibility. Credibility refers to the accuracy or truthfulness of the findings. Credibility asks the question, are the researcher's observations believable (Ary, et al., 2009, p. 498)? Credibility addresses the truth value of the research design. (Ary, et al., 2009, p. 501).

The credibility of this research design is achieved through referential or interpretive adequacy, theoretical adequacy, structural corroboration and the control of biases. Referential or interpretive adequacy refers to accurately presenting the participants viewpoints, thoughts, feelings, intentions and experiences (Johnson & Christensen, 2000, p. 209). The Learning History Methodology (LHM) relies heavily on participant interviews, so it is important to make certain the data collected accurately represents the participants' views.

Referential adequacy can be achieved through member-checks and low-inference descriptors (Ary, et al., 2009, p. 499). In this project referential adequacy is achieved through both member-checks and low-inference descriptors. Member-checks were implemented after the transcripts of the interviews were prepared; a copy of the transcript was sent to the participant for validation to ensure that the data are accurate and realistically presented, adding to the trustworthiness of the research. The final report will also include low-inference descriptors which are anonymous, verbatim quotations from the participants that help the reader experience the participants' unique voice, without revealing identifiable information (Ary, et al., 2009, p. 644).

Theoretical adequacy is accomplished through the clear articulation of the links between the raw data, in this case the interviews, and my comments on what the data contain (Ary, et al., 2009, p. 500). This is also a very important strategy for the LHM in order to not confuse the participants' views with that of the researcher's. The findings of the Learning

History Methodology (LHM) are presented in a two-column format in which the participants' anonymous, verbatim quotations are aligned in the left column and the researcher's comments of interpretation and identification of patterns are aligned in the right column. This clearly separates the two points of views in a visual manner.

Structural corroboration is realized through the use of different sources of data (data triangulation) and methods of collection (methods triangulation) (Ary, et al., 2009, p. 499). This is similar to triangulation used to establish reliability. Data in this particular study was collected through personal interviews with a variety of participants, observations, field notes and documents; a variety of sources were utilized to collect the data.

And finally the control of biases was achieved through reflexivity defined as self reflection to recognize and report biases and by seeking examples, and including a variety of opinions in order to disprove any preconceived expectations or explanations (Ary, et al., 2009, p. 501).

Credibility within qualitative research refers mostly to the accuracy of the findings, because qualitative research often focuses on a specific phenomenon in a particular setting direct transferability is difficult (Aryl, et al., 2009, p. 501). In this research study the goal is to present the case in such a way that readers can make comparisons and judgments about similarities between Stowe and other restoration/adaptive use projects; a form of transferability. Cross-case comparisons with other restoration projects within the U.K. who also operate under a unique partnership of multiple organizations, such as a historical society and an art museum operating within the same historic property, was researched and included. The cross-case comparisons help to determine if findings are in line with other projects and if transferability is appropriate.

Design for Utility. The Learning History Methodology (LHM) is not generalizable to other situations, but it is useful to other organizations. The Learning History does not establish a complete list of guidelines, but there are lessons to be learned. Perhaps others reading it can identify areas of similarity between Stowe and their own organization. The process of collecting data in this research study is dependable in that it was collected in a systematic way, but the raw data is not dependable in terms of being applied outside of the context of Stowe House. The paradigms revealed in this Learning History are constructed by humans and are subject to human error. They cannot be proven right or wrong, they “must rely on *persuasiveness* and *utility* rather than *proof* in arguing their position” (Guba & Lincoln, 1994, p. 108).

Data Collection Procedures

I spent January 14, 2011 through April 14, 2011 conducting research and collecting data in Buckingham, England. I was able to reside on the Stowe Estate during my visit and have daily interactions with the Stowe House Preservation Trust (SHPT) and Stowe School staff. I was able to observe the restoration process through a guided tour through the construction site with an architect while restoration was being completed on the Eastern Pavilion of the South Front. As a researcher in residence I was able to see the Stowe House as it was being used for a variety of purposes. I attended daily meals in the State Dining Room and observed the demands that 700+ pupils place on the aging building. I also attended school lectures and concerts in the State Music Room, and utilized the State Library. I worked closely with the SHPT by job shadowing the Visitor Services Manager and attending educational programs and tours offered by the organization. I also observed the house as it was prepared for banquets and weddings. I attended many meetings related to the

restoration of Stowe House including: the Interiors Working Group, with architects, Stowe House Advisory Board and the Board of Trustees.

I compiled all these observations in a research journal. I allotted the first month of my research to fully submersing myself in Stowe Estate in order to understand how it was managed daily between the three entities. Understanding the complicated relationship between the Stowe House Preservation Trust (SHPT), English National Trust (ENT) and Stowe School took time, and could only be fully done by observing the operations firsthand. As I was collecting data and acclimating myself to my surroundings, I began identifying those individuals involved in the restoration who would be beneficial to interview. Once my research design received Institutional Review Board (IRB) approval, I contacted 11 potential interviewees through email; I included the IRB cover letter and informed consent form (see Appendix E & F) for review in each email and made clear that participation was voluntary, completely confidential and would be voice recorded. Interviews were scheduled with the nine individuals who were interested in participating once convenient times and places were established.

The interviews were held in various locations, but always at the approval and selection of the participant. At the beginning of each interview I went through the IRB approved consent form with each participant to ensure they understood any potential risks and to assure them of their anonymity. If the participant agreed, they then signed the informed consent form and the voice recorded interview began. The interviews lasted an average of 30 minutes to an hour. The format of the interview was very casual and open-ended so that the participant was free to discuss whatever issues they wished to. Using this open-ended format, the participant often gave a more chronological and comprehensive

interview. If there were areas that were not covered or further clarification was required, I did ask the participant for more specific information. Thank you notes were sent to all who participated within a week of their interview.

The voice files produced from the interviews were stored on my password protected laptop. I protected the informed consent forms until I returned to the United States where they were placed in a locked filing cabinet in the offices of the Division of Design and Merchandising at West Virginia University. The interviews were transcribed into text files by me, which were also kept on a password protected laptop, accessible only to me.

After transcription, each text file was sent to the corresponding participant to be reviewed for accuracy, propriety and validation. Participants were given the opportunity to amend or delete any information they did not feel comfortable sharing or that did not accurately represent their views. Eight of the nine participants approved their transcripts, one participant failed to respond with their verification of the transcript and therefore their data is not included in the resulting Learning History. The validated interview data selected for inclusion in the final report was assigned a researcher created pseudonym to assure anonymity. The interview was then analyzed and synthesized by me for inclusion in the dissertation.

Raw interview data will be responsibly destroyed three years after collection. The Learning History may subsequently be repackaged for distribution to an external audience to advance knowledge at a broader scale. If this occurs, participants and the Stowe community will remain anonymous and will be referenced by a generic title (i.e. Autoco).

Dependability of the Study. Dependability refers to the trustworthiness of a research design and the consistency of behaviors in that research design. For the Learning History

research project at Stowe House it was important to establish consistent patterns of working with interview participants. Triangulation and the creation of an audit trail were strategies used to develop dependability in the research design.

Triangulation was achieved in this research project by using multiple methods of data collection, including interviews, observations, documents and historical research were utilized in this study in order to form a more complete and reliable picture of the restoration process at Stowe House.

I created an audit trail for this project by documenting how, when and why the study was completed and how the raw data was kept. I kept a research journal and maintained records concerning participant selection and interview scheduling. The data management plan created prior to data collection informed the audit trail.

Credibility of the Study. Credibility refers to the accuracy or truthfulness of the findings, which provides integrity to the research design. The methods used to establish credibility for this research project include referential or interpretive adequacy, theoretical adequacy, structural corroboration and the control of biases.

Referential or interpretive adequacy refers to accurately presenting the participants viewpoints, thoughts, feelings, intentions and experiences (Johnson & Christensen, 2000, p. 209). This was perhaps the most important strategy for ensuring the credibility of this research project. Referential adequacy was achieved through member-checks and low-inference descriptors. After I transcribed the interviews, a copy was sent to the participant for validation to ensure that the data was accurate and realistically presented, this adds to the trustworthiness of the research. This gave the participants the opportunity to provide further clarification or to delete anything they no longer felt comfortable sharing. The final report

will quote the participants, anonymously and verbatim. This will help to ensure dependability and assist the reader to experience the participant's unique voice, without revealing identifiable information.

The findings of the Learning History Methodology are presented in a two-column format, in which the participants' anonymous, verbatim quotations are aligned in the left column and the researcher's comments of interpretation and identification of patterns are aligned in the right column. This presentation clearly separates the two views in a visual manner and provides theoretical adequacy and increases credibility.

Credibility was further enhanced by structural corroboration. Data for this particular study was collected through a variety of sources including; personal interviews with a variety of participants, observations, field notes and documents. Finally the control of biases was achieved through reflexivity.

In this research project it was a goal to present the case in such a way that readers could make comparisons and judgments about similarities between Stowe and other restoration/adaptive use projects a form of transferability. Through descriptive adequacy I provided accurate, detailed and complete descriptions of the context of the study and its participants so that the reader can determine the appropriateness of transferability to another project.

Summary

The anonymity of the Learning History Methodology (LHM) provided unique challenges to the creation of this research design. However the strategies of establishing dependability and credibility in qualitative research were utilized in order to lessen all potential harm or threats to participants. The anonymous interviews of the LHM were used as

a means to record, validate and analyze various perspectives of individuals with a controlling interest in the historic property. When completed the resulting narrative has the potential to inform future decisions made at Stowe. It may also be useful to others undertaking similar restoration and adaptive use projects.

CHAPTER IV

The Stowe Experience

This Learning History follows the restoration and adaptive use of the Stowe estate from 1997-2011. Interviews were conducted in March-April 2011 and are presented here anonymously, to allow the experiences of those involved to be revealed without risk of being indentedified. The interview data has been organized around recurrent themes.

Table 1

Acronyms used in Chapter 4

Acronyms	Definition
SHPT	Stowe House Preservation Trust
ENT	English National Trust
NT	National Trust (The ENT as referred to by interview participants.)
HLF	Heritage Lottery Fund
WMFB	World Monuments Fund Britain
WMF	World Monuments Fund (The WMFB as referred to by interview participants.)
LHM	Learning History Methodology

Creation of the Partnership

When Stowe School opened on May 11, 1923 in Stowe House as a boarding school for boys its first headmaster, J.F. Roxburgh, had a novel teaching philosophy. He believed that the beautiful setting of Stowe should be an inspiring influence on the students and that every pupil would leave Stowe, “knowing beauty when he sees it all his life” (Bevington, 2002, p. 23). While Roxburgh recognized the value and beauty of the Stowe estate, Stowe School could not continue to afford the maintenance of the house, gardens and many monuments throughout the gardens. In 1989, the school gave the Stowe Landscape Gardens to the English National Trust (ENT) for restoration. Stowe House Preservation Trust (SHPT)

was formed in 1997 to manage the restoration and visitor services. Stowe's reputation as a public boarding school makes it difficult to attract visitors, as many think it is just a school for the wealthy and not open to the public.

Formation of Stowe School.

Participant #4 What has interested me or what I find the challenge that we face is that we are primarily a school. A school that is immensely privileged to sit in an eighteenth century ducal palace. And I think we have to be quite clear in anything that's said about Stowe that, without Stowe School in 1923, the House would not have been saved, and the house would have been demolished for quarry stone. A benefactor, Harry Shaw, looked to buy the house, and then open it to the public; he couldn't do that because he hadn't got an endowment to fund the ongoing operational costs. So that didn't work and the house went back on the market and was bought by a man called Percy Warrington with the express intention of setting up as school.

The school formed in 1923. I think what's interesting, is that the school's ethos has always been largely based around the same ideals as the enlightenment. The individual is important and the collective endeavor counts much more than winning, we refer to a school that's "sustained by a rule of common law" and we respect each other. It is a Christian foundation, which, at the time it was incredibly enlightened for an English public school. 1920s English public schools were still rooted in Victorian ideals.

Legacy of Roxborough's educational philosophy still influencing the school today.

Forming a school here with the express intent of focusing toward the liberal arts was a very bold move and if you look up J.F. Roxborough, the first headmaster, you will see that Roxborough was a particularly enlightened man. He was a classicist and a linguist, but he understood art and architecture and had a fairly amazing

In 1989 the gardens were given to the stewardship of the English National Trust (ENT), with certain areas leased back to Stowe School for their use.

The school could not receive grants for restoration, therefore set up the Stowe House Preservation Trust (SHPT) in 1997.

The system of boarding schools in England is a complicated matter and if you do not come from such a background it can take time to understand it.

collection of architectural photographs from around the world. If you remember one thing about Roxborough, I think the most fantastic thing was that he wanted every boy who came to Stowe to recognize beauty for the rest of his life. I think for a school that's in a place like this, that's a pretty good starting point. So we've always had that tradition, but of course maintaining an estate of some 700 acres, 35 temples in the grounds, plus this enormous mansion was a drain on any school. The school did what it could, but by the 1970s/1980s it was in very, very poor state of repair. Something had to be done, that's why we transferred the grounds to the NT (National Trust), but had the lease back so we could use it. And why we set about restoring Stowe House.

But because we're primarily a school, we are in a difficult position with taking in visitors and, also because we're a school we can't afford to raise the money to restore the mansion. So as you know, we face a £30 million restoration program, we've had some £ 10 million from benefactors so far, some of the benefactors, don't mind the access issue, they just want to see their money going into restoring a beautiful building (Interviewee 4, personal communication, April 7, 2011).

Participant #3 It took me two years to understand how the school functioned. If you don't come from this background, it is quite a complex setup. There are subtle nuances, and equally my job has subtle nuances, until I went on leave and I had someone else do my job, no one quite understood the subtle nuances within my job of understanding the school. It's much more complex than you would think it would be. People at the school must think that in the term time, I must sit twiddling my thumbs because I've got no visitors.

Public's perception of "public schools." In England public schools are actually what an American would consider private schools and require tuition. It is a historical term for when schooling cost such a low amount everyone could pay it, making it a "public school."

It doesn't help that it's a public [private] school, if it's just a stately home, because there are lots of stately homes open, people wouldn't think that, but it doesn't help that it's a public school from that point of view. Because then people think only the elite can come here, and that's not what we're trying to say. We're not trying to say, "Oh look you don't have £27,000 so you can't come here." So I just have to be very careful, I'm sure other people are thinking it, but I just have to be very careful, how I pitch things and the type of questions that I talk to children about or that I may say to the adults or the teachers, I have to be really careful that I'm not at all patronizing to them (Interviewee 3, personal communication, April 7, 2011).

Balancing the Partnership

Over time the Stowe estate has required the involvement of three partners to achieve the long-term existence of Stowe House and Gardens. Stowe House Preservation Trust (SHPT), English National Trust (ENT) and Stowe School each have unique responsibilities in managing the Stowe estate and at times competing goals. Balancing this partnership is vital to the success of each organization as well as the overall estate. Each organization wants Stowe to be successful, but they all have different ideas on how to reach that goal.

Participant # 3 I've got more involved with the restoration, so now it's sort of balancing the restoration with house opening, with events and being that linchpin between the school and SHPT, but also of course the National Trust.

What factors are in place to help balance the partnership?

We have a strategic plan (see Appendix H), we have our Partners Working Group meetings, we have the Service Level Agreement, so all these things tie up the partnership in several different ways, to understand where we stand at any certain point, how we can help each other, how we

will be helping each other, how we should be helping each other.

Each partner wants Stowe to be the best it can be, but each partner also has a different idea of how to achieve that.

This is how I explain it to visitors, is we all want Stowe to be fantastic; we just have slightly different ideas of how we want to get there. And I think if everyone thought like that, then we all just have to keep in mind that we all want Stowe to be fantastic.

Each must realize that the other's success is their success. It must be a symbiotic relationship.

Yes okay, the school will have a different way of seeing it, but actually if they had beautiful grounds, then they're more likely to get more people coming here, even if the grounds are owned and run by the National Trust. It does have to be a partnership, there's no other way around; we all live here. It's what I passionately believe in, it's just investing time in all these set ups, to try and keep Stowe going forward and fantastic. And it's what I genuinely believe in because I love Stowe. And I believe that we all can work together and I believe that we can have our own little separate areas, we just have to listen to each other and work with it. And I think on the whole, it does work. And it has been much better than it has ever been before (Interviewee 3, personal communication, April 7, 2011).

Participant #4 I was recruited by Stowe School, really to look after all the support side of managing the school, which included working with the National Trust and the Stowe House Preservation Trust.

A previous consultant was managing the restoration but not the relationships, and was therefore not as successful.

But I suppose the most significant thing from Stowe House Preservation Trust (SHPT) point of view is that we had a consultant appointed who was managing the restoration project but they weren't actively managing the relationships between SHPT and the other partners on site, nor were they managing the wider work of SHPT in terms of visitor services and visitor management or indeed the relationship with the National Trust (NT).

Now we reached an accommodation where everything was working okay, and then sadly in December 2009 [the consultant] was taken very seriously ill and had to give up the project and I was asked by the Stowe House Preservation Trust (SHPT) Chairman of Trustees if I would take it on. And so since December 2009, I've also had full responsibility for managing the restoration program and charting where the restoration goes to next once we've finished the external works.

And the background I inherited, therefore, was National Trust (NT) taking over the landscape gardens in 1989, and the formation of SHPT in around 2000. But prior to that, Stowe School owned the freehold of the gardens, the house, the temples in the gardens and large parts of the land around. And in the late 1990's there was a very complex series of leases drawn up which gave the NT the freehold of the gardens so they could open the gardens to the public and gave them responsibility of restoring the garden temples, with the exception of the Gothic Temple which went to a different organization who let it out as a self catering holiday property. And the National Trust also then have what we call an under lease back to Stowe School, so that Stowe School pupils, parents, Old Boys of the school, Old Girls, can enjoy the grounds. That's quite important for us, because of course our sports fields are within the grounds. So the NT now has the freehold and then lease areas back to us for our use. And that's the framework in which we're continually working this relationship with the NT, and I think it's pretty unique.

We have a similar arrangement with SHPT in that the SHPT have taken a lease on the house, but we pay them a rent to occupy it through the year, and that rental figure of about £100,000 or probably now about £110,000 per year is quite important, because

The lease framework that holds the partnership together is rather complicated.

The English National Trust (ENT) actually own the gardens, but allows the school pupils, faculty and family to use the gardens, and leases certain area back to the school for sports fields.

The school is considered the tenant of Stowe House, and pays rent to occupy the building. The rent the school pays covers the yearly maintenance costs of the house.

that's about what our maintenance costs are on the house, so we're managing the maintenance as we move forward from restoration. But the real benefit of the SHPT creation was to give us a body which could raise money and then carry out the formal restoration. And so I manage two parts of the triangle that looks after Stowe, I manage Stowe House Preservation Trust (SHPT) and I manage Stowe School's activities with the National Trust(NT) being responsible for the grounds.

This three partnership set up is rather unique for country estates of England.

Now I think this is all pretty unique on a country estate in this country. My knowledge isn't exhaustive, but I've studied quite a lot of similar places with similar arrangements, sites not necessarily historic houses, but industrial sites. There seems to be nowhere that has this sort of partnership running it between three entities and continually evolving the landscape to the benefit of the visitor.

Attempting to balance daily use of a building that was built to impress and entertain on a limited schedule. The family did not live in the house year-round and they certainly did not have 700+ pupils daily using the house, which takes a toll on the house.

And that's something that we're balancing every day. A country house that was built to entertain, to impress, and where the family lived, latterly at least, in the quarters right down on the ground floor, and the piano nobile was for show and display and entertaining. It's being used every day of the year, pretty much, certainly every term time day by 700 pupils, 200 staff and throughout the holidays still by 200 staff and in the summer again another couple of 100 students for summer schools. And the only rest the house gets is a week over Christmas when it's completely closed (Interviewee 4, personal communication, April 7, 2011).

Participant #6 I think the interesting thing about Stowe in terms of its representation and as a house is its dual relationship as it works as a school. I think that most people that come here probably come to see how the other half live. How all these privileged

children come to school and I think it's very interesting to see that. I think it's excellent that they are using the main State Rooms as well, because it actually is an excellent re-use of a space.

[I heard] in a recent lecture, that these building need to be put to appropriate uses and the only sort of thing that a house on this scale could have been re-used by is an institution such as a large school. And I think it does it very well, and I think that the key thing to me is, and [a board member] said it to me initially, 'The success and the completion of the State Rooms and of the representation and restoration of Stowe is a symbol also of the success of the school' (Interviewee 6, personal communication, March 29, 2011).

The success of each entity separately is also the success of all the entities.

Participant #9 It has to be mutually beneficial. Every relationship, in order to be sustainable, has to be mutually beneficial and that is one of the keys to my strategies for community engagement. Community engagement should not be random or reactive, but that it should be sustained, should be meaningful, mutually beneficial, and have outcomes that are either in terms of a long-term partnership relationship or in terms of profile raising or a product in terms of outcomes (Interviewee 9, personal communication, March 24, 2011).

Phases of Restoration

Stowe House Preservation Trust (SHPT) was formed with the mission of restoring the architecture and interiors of Stowe and opening it to the public. A six-phase restoration plan was developed and began in 2000. Phase 1 included the restoration of the North Front and the Colonnades and was completed in 2002. Phase 2, the restoration of the Central Pavilion, South Portico and Marble Saloon was completed in July 2005. Phase 3, the restoration of the

Eastern and Western Pavilion and the State Library, was just recently finished in the fall of 2011. Phases 4, 5 and 6 include various interior projects.

Participant #2 I think the [restoration] process has to be viewed entirely positively, even though sometimes you walk into it with some reluctance (Interviewee 2, personal communication, April 7, 2011).

Participant #3 In 1997 a six-phase restoration plan was set up, to restore the whole of the main house, including the stable block and coach house, where boarding houses are and the power house yard area, which is where all the maintenance occurs (Interviewee 3, personal communication, April 7, 2011).

Phase 1

Participant #6 The first phase was to repair the North Front and the Colonnades (Interviewee 6, personal communication, March 29, 2011).

Participant #8 At the start of Phase 1 a selection process was carried out to appoint the various consultants and professional team - architects, quantity surveyors, structural engineers and the main contractor. The overall project was divided into three sub-phases:

Sub-Phase 1- East and West Colonnade and East and West Forecourt Walls,

Sub-Phase 2 - Central Pavilion, North Portico and East and West Screen Walls and

Sub-Phase 3 - Forecourt pavings and landscaping

The contractor was appointed in August 2000 and the work was completed at the end of 2002. Because Phase 1 works were programmed to go on longer than a year, they had heaters going 24/7 for several months in

the winter behind canopies which was quite unusual. This was to aid the drying of the render and to keep the air at a constant temperature (Interviewee 8, personal communication, March 25, 2011).

Participant #2 When I arrived the whole of the North Front, was in scaffold, underneath nets, and that lasted for approximately a year (Interviewee 2, personal communication, April 7, 2011).

Participant #3 So 2000-2002 is the North Front. 2000, when they get their first Heritage Lottery Fund (HLF) grant to do the whole of the North Front, basically almost 90% they got their money from HLF to do the whole of the North Front. And that took 2 years and the project came in, and I'm always told by [my predecessor], it came in on time and under budget. So you know that was quite an achievement. So the architects were our current architects, so they've been involved since 2000. If you see photographs of the North Front of the house before it was done, it was really grimy and patchy and it looked really bad (Interviewee 3, personal communication, April 7, 2011).

Phase 2

Participant #6 The second phase looked at the central mansion on the South Front, and also the Marble Saloon and the roof (Interviewee 6, personal communication, March 29, 2011).

Participant #2 Then a second phase involved the erection of a massive freestanding roof with pylons at the front and back of the building. So there was a restoration roof with a false ceiling put into all areas on the top level as a crash deck and the Marble Hall was also restored during that period (Interviewee 2, personal communication, April 7, 2011).

Pupils actually live in Stowe House in dormitories located in the eastern and western wings of the house.

Phase 3

Participant #8 During Phase 2, temporary crash decks were constructed in the top floor bedrooms of Temple and Grenville in order to protect the boys whilst restoration work was taking place on the roof. For Phase 2, the scaffolding over the marble saloon and roofs was one of the largest spans of scaffold at that time erected on a building project (Interviewee 8, personal communication, March 25, 2011).

Participant #6 The third phase was the repair of the West Pavilion, the linking wing and the East Pavilion and the other linking wing there (Interviewee 6, personal communication, March 29, 2011).

Participant #3 They were then very lucky to get Heritage Lottery Fund (HLF) money to do the South Front Portico and Steps and to remove the water tanks from the roof (Interviewee 3, personal communication, April 7, 2011).

Participant #2 Now we are on the Western Pavilion, we live in the western pavilion. And that only intrudes upon two resident members of staff and a number of boys who are living in that area (Interviewee 2, personal communication, April 7, 2011).

Phases 4, 5 and 6

Participant #6 Phases 4, 5, and 6 were various interior projects (Interviewee 6, personal communication, March 29, 2011).

Participant #3 So we're doing Phase 6 earlier, which was all the internal rooms, eventually, gradually. And then Phases 4 and 5 which were the two wings, we did think that if we [applied for HLF money], or any external funding they'd have to be open to the public. Ten years ago, we thought that was feasible, that we could open up areas to the public in holiday time, like the boarding houses over there. But it's looking less and less likely, just because the place is just so

busy. So unless we go sourcing a donor that goes, “Yes, I’ll give you x amount of money and it will never be seen by the public.” We’ll have to work on those, we’ll get all the stuff done, give it another three or four years and then work out where we’re going with the two wings. Because they do need to be done, because otherwise they’re just being patched by [our maintenance men] (Interviewee 3, personal communication, April 7, 2011).

Formation of a Qualified Restoration Team

Finding qualified professionals who work well together is a challenge, but is also a key component in any successful restoration process. Having an open, functioning relationship between the construction team, architectural firm, conservation firm, project manager firm and the client will lessen the complications of an already complicated project. Stowe has been fortunate to have the majority of the same team members in place since Phase 1.

Stowe House Preservation Trust (SHPT) has been able to construct a team of professionals who are dedicated to the project and also work well together.

Participant #3 Doing the Marble Saloon early showed what a great team we had in [construction team] who came on the second Phase, they weren’t here for the first. [Architectural firm] and [Conservation firm] which we still have today, so that was the point it was showing what a great team we actually did have. And everyone was very, very tolerant, and of course even if it’s my real first experience of working in such a large scale project like this, I don’t have any other benchmark to know what’s good and what’s bad, but loads of people have told me that everyone said it was a really, really good team. And working with them is great (Interviewee 3, personal communication, April 7, 2011).

Participant #6 I think that having established the philosophy with [construction

company] for the past seven years now that they know what we're expecting and we know what they're expecting as well, so we've got a good team. And the people that were involved in Phase 2, certainly which they [construction company] were, are still onboard and still involved in the project, perhaps at slightly higher levels but yes it all helps, the knowledge and the drawings of the previous phases are there for us to use. You know having the right people with you as well to sort of make those decisions, to allow you to form an educated and robust design really or robust justification for your proposals (Interviewee 6, personal communication, March 29, 2011).

Restoration Philosophy

An important step in building a team of professionals is making sure that they understand and can abide by the restoration philosophy set for the project. Restoration decisions are made based on the philosophy of those implementing the restoration process. Early on in the restoration process, Stowe House Preservation Trust (SHPT) defined a restoration philosophy that has guided the project; this philosophy is to leave as much of the original material as possible and to accept cracks or damage so long as they are not structural. This restoration philosophy is not about perfecting the past, but saving and celebrating it. Having this philosophy in place has allowed SHPT to be consistent in the restoration repairs and maintain the historic integrity of the building fabric.

Initial research, led to a decision on how to approach the restoration, forming the restoration philosophy that has continued to guide the project.

Participant # 6 I know that the [architectural] team did a lot of research in terms of defining the repair and the philosophy of the repair. Looking at the stones, there's a lot of badly eroding stones, a lot of face bedded stones. We essentially defined and agreed on a way of moving forward in terms of the replacement and that's really what we're still sort of

following, all that hard work now that's been done in the Phase 3 series of repairs.

I think the interiors work and the exteriors work is important to compare together as well. In a similar way that we're restoring the internal rooms back to sort of 1800 or whatever the date was that was agreed, we're doing similar kind of things outside as well. We're restoring those lines and restoring some of the pride of how the house and the Temple would have looked at that date and that age. And that's what we should see at the end. We haven't made a decision to block up openings and things that have been done for good reasons. I think we're certainly seeing the project more as a restoration in terms of its conservation.

So for example, you know, the other way of doing it would be to do lots of indents and things like that or to leave a lot of it quite eroded, we've had to make quite specific decisions in our philosophy. We won't for example cut indents in to keep a larger section of stone; we have to make a decision on replacing larger sections of stone in that way. And certainly, a lot of the stone that we've replaced on items like plasters, the rustications, the main elements of the building where you really expect to see clean lines, we've done quite a robust series of repairs there, whereas in another project you might have taken a different decision. Having said that, in non-structural locations we've been able to keep more, we're not trying to make the building as perfect as it was so where there's the odd crack here or there, or the odd damage to the odd bit of stonework we're accepting it (Interviewee 6, personal communication, March 29, 2011).

The philosophy guiding the restoration project is to leave as much of the original material as possible and to accept cracks or damage so long as they are not structural.

During the restoration of the Marble Saloon, two tennis balls were found lodged between the plaster rosettes of the coffered ceiling. This represented a point in time when the

Participant #2 I think the fact that when they restored the Marble Hall, they removed two tennis balls and put them straight back again is a very profound statement about

Marble Saloon was used as a games room for the pupils. Not removing the tennis balls showed the restoration philosophy is not about perfecting the past, but saving and celebrating it.

what the restoration is. It's not about obliterating the past, it's about celebrating it and restoring it so that people in the future can still enjoy. And there are good stories about how the place has come to be and how it will develop in the future. So I think that's a very profound statement that I would hope is reflected in other aspects of the restoration (Interviewee 2, personal communication, April 7, 2011).

Restoration Planning

The interview data revealed that there were pitfalls in the planning of the restoration, mostly concerning the lack of appropriate research prior to the construction began. The need for a project manager to oversee the project was also uncovered.

Research. Research is essential to producing an accurate restoration project. Those involved in the restoration at Stowe have struggled to complete sufficient research before the construction phase of the restoration. Instead they have conducted the research as the restoration progresses. The research completed during the midst of the restoration can have implications on the alternations that have already been completed or the funds that have already been raised. The location of the Stowe manuscripts at the Huntington Library in California, USA poses a logistical challenge in completing research as well. The overall lesson learned regarding research at Stowe is that incomplete research leads to incomplete projects.

*Sources available for research include:
1848 sales catalog
1921 sales catalog
Furniture inventory prior to 1848
Seeley guides
Archival information at Huntington Library*

Participant #6 We've got several sources; we've got the sales catalogs, which are interesting. There's the 1848 sales catalog and the 1921 catalog which tells us about the furnishings and the paintings and things like that, what was sold and who bought them. But also we have an inventory of furniture that was produced before the 1848 sale which is quite useful because that lists quite clearly

what was in each room. And in addition to that, there's the Seeley guide, which form our basis for our factual understanding we work here at Stowe. And the archival information at the Huntington. So all of those sources we use when investigating each room, and we have [a research consultant], as I mentioned before, who I'm constantly in liaison with at the moment over the Egyptian Hall and the North Hall (Interviewee 6, personal communication, March 29, 2011).

Another source of data the Photographic Archives at Stowe.

Participant #7 Then established what we then called the Photographic Archives in 1985. I then took over in 1986 and spent a lot of time in that period just simply having anything which I could lay my hands on, photographed and photocopied, just to build up a collection of images. Of course, once the National Trust (NT) came along and then eventually the Stowe House Preservation Trust (SHPT) that's been incredibly useful because it's given us a whole bank of images we can refer to quite quickly (Interviewee 7, personal communication, March 25, 2011).

How should research be done? Should research be done before restoration works are carried out or ongoing to allow for new possibilities as you are doing the restoration?

Participant #3 Just doing your research properly, trouble is, I don't know what comes first, and it's easy for me to criticize. Because it could be that we didn't know until we got to that point. But I think there's elements of that, but there's other of just not actually thinking, sitting down properly and thinking. But then that's what the Interiors Working Group is supposed to do, but it's not [what they do] it's just talking shop for people who like talking about interiors. I think the lanterns in the library, and even the paint scrapes of the ceiling, was just appalling, because we'd do stuff and go, "That doesn't make sense; can you look in the Huntington library for stuff?" Why weren't we looking in the Huntington Library before to inform that decision? Or maybe that doesn't work that way because of the way the Huntington Library is set up.

The governance structure starts to hold the restoration back. Example: the Interiors Working Group is meant to be doing the research of the room, but it is not getting done because of the set up of that committee. The members are not as involved as they should be to be efficient.

There is an issue of not having a qualified person dedicated only to doing research and a qualified person dedicated to only project managing.

The importance of doing research at the proper time and in the proper order is emphasized by the participant. Example: The current issue of deciding on the process of restoration in the Music Room.

Incomplete research leads to incomplete projects and potentially costs more money as the new research may have implications on the fundraised money or may change the work that has already been done.

Maybe you have to do that stuff first and go back and actually look at this precise period. If you were a curator, you would not be doing it this way. If I was the proper person doing it, I would start at the beginning, not halfway through and then come back. But that's the point; we don't have dedicated people, so those are the two things, a project manager [and proper research]. You see a project manager would probably pick up on this, that's the irony, or leave a few of us free to think about those things.

The other thing that came through the library restoration, and we didn't learn from for the Music room, is that we do the research as we go along. Now that sounds okay, but that's not right. Because you do initial research and then you have fundraising and then you've got all your money and then you think you've done all your research and then somebody says, "Well what about such and such?" And we're like, "Well yeah, better look into that" and actually that has implications on the money we just raised and actually why didn't anyone come up with this picture of the lanterns of the library at the beginning? Because now it's not a complete project anymore.

We've done it again in the Music room. I have said right from the start in the Music room, there's a certain amount of it which was redone in the 1960s and it's not terribly good. Everybody has to be happy with the decision, including World Monuments Fund Britain (WMFB) and the fundraisers, that we either touch up the 1960s stuff or you take it off and start again. Have that discussion now, not when you're halfway through. I could see that happening, which is why I brought it up. I thought I don't care how many people hate me for this, I'm not having this halfway through and then suddenly the conservator says, "Oh gosh, actually did you know this?" I mentioned this scenario a year ago when we

first started doing the Heritage Lottery Fund (HLF), I'm like this needs to be done properly, don't touch up the touch ups. Or at least let's all have a decision about it, so that we can justify it now and in the future.

I don't think we've come to [a consensus]. The architects have come to a conclusion, but I think everyone else has to be happy with that conclusion. That it's a touch up or [a re-do]. The trouble is the conservators didn't tell us, they're a bit wishy washy so we're bringing them in next week to have their educated opinion about if it was them, what would you do, and what are the implications and how much is it. But let's just decide now, and if I'm wrong fabulous, let's all move on. Let's have that decision now; make a decision and move on (Interviewee 3, personal communication, April 7, 2011).

Participant agrees that more historical research is necessary before the start of restoration but that there should be allowances for discoveries during the restoration process.

The location of the Stowe manuscripts at the Huntington Library in California, USA presents a logistical issue with conducting research.

Participant # 7 I still think we could refine what we do and do more historical research before we start on the restoration of the individual areas. But having said that, you've got to tie the two together, because very often you only discover interesting bits as you start the restoration and take ceilings down and start cleaning up walls and discover what's in the wall. But really you need to discover what you can first and, of course, there's a vast amount in the Huntington Library in America. I don't think we've begun to solve fully that problem yet. A number of people went out there in the early 1990's soon after the National Trust (NT) took over the garden, but there was problem; they put it on a database in the NT and I think it has only remained on a particular database which was then moved and somewhat corrupted, so it hasn't been the best example of how to do it. [A research consultant] has been working at the Huntington more recently and that's what I think works quite well. It still really needs some long term plan of how you can continue doing all that. My view is that, if

Suggests an online scholarly collection of data on Stowe for their own benefit as well as others interested in Stowe

there were funding for it, it would be a tremendous resource to put a lot of material available online in a scholarly collection, because Stowe's got quite an appeal around the world, and people would love to be able to access historical manuscripts and material of all sorts (Interviewee 7, personal communication, March 25, 2011).

This participant viewed the restoration process as an outsider. To this outsider participant there was sufficient research, but those who were more closely involved, disagreed.

Participant #8 Before each phase began a lot of preparatory and investigative work was carried out. For example choosing the right materials on the first phase, like the sand for the render and the taking of paint scrapings to record what paint colour had been previously used. A researcher was also employed to look through the records now stored in the Huntington Museum. It was the same on the second phase. I remember they did a lot of opening up of the fabrics to look at the condition - so there was as much work done behind the scenes, which nobody ever saw, as actual men up on scaffolding (Interviewee 8, personal communication, March 25, 2011).

Lessons Learned from the Library. During the restoration process certain rooms have been particularly challenging. These rooms have highlighted Stowe House Preservation Trust's (SHPT) areas of weakness. The library is one such room. It was restored out of sequence with the planned restoration because of an emergency situation; the roof was falling down creating an unsafe environment. During the repair gold gilding was found on the ceiling, changing the course of restoration and requiring further research. It was also difficult to make decisions about the library interiors because of the infrequent meetings of the Interiors Working Group. This room in particular highlights the research and governance issues that SHPT has struggled with during the restoration process.

The ceiling was damaged because the wrong roof had been installed in the early twentieth century, allowing water in.

Conservators discovered that there was the presence of gold gilding on the library ceiling. This changed the plan of restoration to include gold gilding.

Participant #6 You know particularly with the library, it was an amazing project to be involved in. You know again, the wrong roof on that building had been installed in the early twentieth century. And water leaked in causing damage to the roof structure, also the fact that it was not the right shape, so the structure of the new roof was resting on the old roof and causing damage to the ceiling. And it got to such a bad point, that about 10-15 years ago, sections were falling down and we were asked to advise on it, a structural engineer had a look at it and recommended that they put up a net to stop extra bits falling down and potentially harming someone.

At that time, we also got a conservation specialist, who looked at plaster to come and have a look. And they noticed that quite a lot of plaster was quite delicate and friable and also they noticed that it was gilded and that really changed our way of thinking about the library. Because up until then the ceiling had always been sort of white and that's all anyone expected. But we found out, incidentally really, that it was gilded and Stowe House Preservation Trust (SHPT) wanted to know more about that, so we commissioned a lot of archival research at the Huntington.

There was a certain amount of quantity or cost of gold that was used on the ceiling. And then alongside that information we also commissioned a painting expert, who came along and did some samples to have a look at the ceiling to see where they could establish the gilding in the scheme. And it took [the painting expert] literally all Christmas, they took something in the order of 600 samples to build up a picture of what was in library, using his analysis and [the research consultant's] analysis, we were able to put together a scheme that tied together the certain elements of his, plus had similar quantities of the gilding as well, we [then]

built up a pretty good idea of what was there. There were question marks, the information just wasn't certain enough to be able to say, "Well that was definitely gilded", but should in the future further evidence come to light, that there was gilding there then, it's easy to get back up there and gild it at that stage, so that's a good example of where sort of things are gray, how you handle that (Interviewee 6, personal communication, March 29, 2011).

Participant #3 The lighting in the library, I could just write a sitcom on it, just on that alone!

The members of the Interiors Working Group, who make decisions on what time period to restore to, only meet three to four times a year. This makes it difficult to maintain continuity in their decision-making.

For people who are on the ground [regularly working at Stowe], who think about this all the time, it's like "Why are you going over this again?" But because people only meet up three or four times a year, [they think] "Oh it's the library - what did you do last time about the library?" No we've done this, several times, but the library was a farce. I'd love to write a sitcom about inadequate and inappropriate people and ideas.

Through research, two sketches were found of what the library lanterns were thought to look like. A lighting company was asked to do a mock up based on these sketches; however the mock up was unsatisfactory.

So we had those two drawings, which looked fairly similar. Our [architectural firm], got a lighting company, and they were quite eccentric these guys, to do a mock up. I can't even describe it to you without laughing. If you went into a pub now, I'm sure they have them in America, because your wagons are more recent to your American history, you must have seen wagon wheels with lighting - that is no word of a lie. That was their mock up, so they had a huge wagon wheel, with the chains leading up, with lights on the wagon wheel, and they were adapting it from those lanterns.

Now, what's even worse just makes me cry laughing it at it. We all went in to look at it, and everybody was just like "What??!" And we were all trying to be polite because of these two guys, and we're all thinking,

“What?!!” That was just one room and that took several months (Interviewee 3, personal communication, April 7, 2011).

Project Manager. A project manager was employed during Phase 1 and 2 of restoration at Stowe, but due to health reasons the project manager for Phase 3 stepped down. Many of the participants noted that having a project manager during the first two phases made all the difference in how the relationship between the Stowe House Preservation Trust (SHPT) and Stowe School was managed during the restoration. When a project manager was involved during Phase 1 and 2 there were fewer conflicts between the SHPT and school and the SHPT staff was able to focus more attention on research and the restoration.

Participant #3 From a restoration point of view, I think, I know definitely, we didn't have a project manager for this [phase]; we were project managing with [architectural firm], well that's not good enough. We all knew it wasn't good enough, but the original [individual] backed out for health reasons in December 2009. So it takes a couple of months to get somebody that's fine. We had a two year restoration project of which we were only three months in, get somebody else.

And in fact, with doing the Music Room, we're talking about getting basically a project manager, so the [construction company's] not involved, let them get on with the stuff that they're here for. So we're talking about getting someone just to tender it so [the project manager] can do all the work, look after all the subcontractors, so they'll be a construction type project manager.

I have to say that the [project managing firm] for phase 2, who I had worked with, our project manager, was fantastic, because they found holes in stuff. They would think,

Participant believes project managers are well worth the cost because of all the details that they are able to pick up on because that is their sole job. Rather than trying to project manage and open the house and manage the restoration etc.

Everyone has too much to do already to try and keep up with the responsibilities of a project manager.

Not having a project manager overseeing leads to more complications between the Stowe House Preservation Trust (SHPT) and those affected by the restoration. A project manager would help to manage the relationships and facilitate cooperation.

“Hang on a minute, that person hasn’t mentioned that”, and “That’s good to know”, and “That’s what you need.” If you’d asked me before that experience if you don’t mind paying £50,000 a year for project manager, I’d go, “What a waste of money I’m sure we could sort it out between us.” That’s probably what you’d say until you had the experience of a good project manager. They would suddenly go, “Oh you know, oh gosh that and that.” And we’d go, “Oh thank god you saw that, ‘cause that’s quite crucial.”

That’s where we’re really falling down because of the fact that all of us have other jobs to do and you know, including me. It’s like “Matron, sorry we’re coming up in five minutes to do a bit of banging [construction work], should have probably told you a couple of days ago but we forgot.”

That is me, completely me, just not managing the communication between it, and you know you’ve seen this situation [situation with a matron who was being affected by the restoration]. She’s perfectly right, everything she’s said is perfectly right. So I’ve been much better. With [the other matron] it wasn’t as much work, it wasn’t reconstructing her house, which is what’s happening over this side, so it wasn’t as much, but it was really bad on my part on the lack of communication. So I’ve been careful here but it could have been that a project manager could have been project managing and I could have just dealt with the communication, do you see what I mean? That might have been it. I’m not necessarily asking [the project manager] to deal with it, maybe I can still deal with it, but they tell me what to tell them. But there have been so many gaps.

That’s the point, we don’t have dedicated people, so those are the two things, a project manager, you see a project manager would

Stowe House Preservation Trust (SHPT) needs a project manager for subsequent restoration phases.

The people involved make or break the restoration process. Managing the relationship between those doing the restoration and those who have to live with it is essential.

There have been examples where the restoration staff and the school staff have been able to work together to make the adjustments easier for the inhabitants.

probably pick up on this, that's the irony, or leave a few of us free to think about those things. Project manager, would be so much better from the start, and the school moans to me about me, I'm like, "No, I agree, we need a project manager, no I'm not [a project manager] and I don't know everything and I don't know construction techniques." I keep my eye on the ball, it's really hard with everything else I do. [We need] a project manager without fail. Project manager, just is the number one priority of anything before the restoration even starts. No matter how much they cost. I think that's where on this we really fell down (Interviewee 3, personal communication, April 7, 2011).

Participant #2 I think one of the greatest determinants of the restoration process is the people involved. So if you work with a decent project manager, a decent site manager, you've got a decent school link in place, then actually it becomes a very livable process. Fortunately, two out of the three stages that we've gone through, we've actually gone through with the same project manager who I think is fantastic and a contractor who's become increasingly good as they've become more and more experienced.

Their ability to actually develop a restoration around a living house that has the pitfalls and the rhythms of a school and their ability to communicate ahead of time what is going to happen then to negotiate with them. In fact it is a partnership ultimately, you can't help but feel a little bit of resistance toward it because it is an intrusion, at the same time when you see the benefits you appreciate it, you understand that it's worth going through.

But we have been able to work together, so there have been times where they've had a definitive issue and we've not been able to do anything other than actually do what they

want to. But there have been other times where they've had an issue, and we were actually able to advise them, "Well, you could do it better this way." And we've actually worked together, they to make our lives easier and we to make their lives easier too.

So I think the human dimension if you have the right people in place who don't just have passion about the building, the whole impressive restoration, but understand that actually this building is here because people have created it and it's being maintained by people for better or for worse sometimes. And there is an appreciation, there is a relationship there (Interviewee 2, personal communication, April 7, 2011).

Restoration Conflicts

The restoration process has encroached upon daily life of Stowe School, Stowe Events and Stowe House Preservation Trust (SHPT) tours. Most of these inconveniences are unavoidable. However, the interview data reveals that so much of how the inconveniences are perceived is based on the personnel involved. If those affected feel that they have some control in the situation, or have been considered in the decision making, they are much more agreeable to the process.

There have been conflicts between the restoration process and the Stowe Events office. Rooms that have been closed due to restoration have also been rented out for weddings and other events. Increased communication and collaboration between these two groups would help to avoid these conflicts.

Participant # 1 But from a restoration point of view, I've been around while a huge amount of the restoration has been going on. So things like rooms being closed for restoration when there are events and things on. I've been around, when there's been, I won't say conflicts, but lots of animated discussions about how windows are being taken out of one place, but now that [space] has actually been booked for a wedding. There can be things like that, that do arise quite often.

The restoration needs to be done and everyone's very thankful when it is done, but during the process people aren't necessarily as adaptable as they like to think they are. So that's been quite interesting to see. And looking forward to the next stages of restoration, I think it will be interesting to see how the Stowe House Preservation Trust (SHPT) timetable things in so it doesn't clash with too much else that's going on. Because also there's a school side, and of course they want to see the rooms beautifully restored, but it's a case of making sure they're happy with the upheaval in the mean time. I think as a whole they are, but there are individuals who when it affects of them, of course they're not very pleased. I think it's dealt with quite well. At the moment it's one of those things there are always going to be people who don't like what's going on; in this case it's just working around them (Interviewee 1, personal communication, April 11, 2011).

Effect of Restoration on Residents of the House. There are dormitories located within the main section of Stowe House with many pupils and staff residing. The pupils and staff have continued to occupy the dormitories throughout the restoration even though it has been an inconvenience at times. There have been alterations to their living quarters including a false ceiling put in place to protect their residences and the application of gauze over their windows to reduce dust infiltration. The pupils are already living in the transient environment of a boarding school, making them more adaptable to temporary nuisances of the restoration. The restoration process has made the house seem a bit more museum-like to the pupils which in turn changes how they interact in the space.

Participant #8 The [Temple pupils] stayed [during restoration], but for quieter times, study times, they had use of a portacabin. As I said, it was a very tough project because it

was the first real major refurbishment works Stowe had carried out for many years. Minor works like bathroom refurbishments/repairs/decoration in classrooms etc. happen throughout the year all the time, but of course they are a lot less disruptive (Interviewee 8, personal communication, March 25, 2011).

Participant #2 Nobody's actually moved living quarters, we've all stayed pretty much where we were, there have been times, where it has been unsustainable to be here. But that has been for very short periods, so there was a period of approximately 4-5 weeks in the summer holidays, I think that was either 2002 or 2003, where we moved out as a family and we were primarily put up in alternative accommodation.

Example of restoration's effect on a resident staff member.

At the moment we have one other person who is being severely discomforted and inconvenienced by [the restoration]. This staff member is staying in a hotel tonight, strangely enough, because the noise intrusion from what is going on around their private area, is pretty horrid. However, the staff member on the floor below does not seem to be experiencing the same degree of problems. So we're probably in my experience the three most inconvenienced people, there are other people on the other side of the building, the Eastern Pavilion, which is perhaps more affected than we are, or has been at different times.

*Effect on pupils' residence:
During Phase II, a false roof took away 18" of ceiling height in the pupils' residences.*

I think perhaps the most intrusive phase that I remember was when we had the roof hung over the top and that was very, very significant. It must have been in the second phase when we had the false roof on, everybody on the top level of the mansion, and there are a number of boys rooms in that area, it must be about eight or nine boys' rooms in that area. All those lost about 18 inches of their ceiling space, as a false ceiling

An oversight of the restoration process, contract wording only held the contractors responsible for a portion of the wall resulting in a mismatched final product.

Resiliency of the pupils:

Currently some windows are covered by gauze to limit the dust infiltration, but it also limits natural light.

Boarders are already living in a transient environment, so they seem to be more accepting of the interruptions caused by the restoration.

was put in and that lasted for the full term of an academic year. Sadly when they took that out, the contractors were only contracted to put right everything down to the false ceiling and above, therefore as you walk round that level you'll see that all the walls are two toned. So they haven't actually completely fitted what they painted the top bit with, with what already existed on the lower bit, so the making good in that situation I think was entirely unsatisfactory. Unfortunately the contract was so worded, that they were entirely in their rights to do that and we had no rights to enforce them to do anymore.

I think that [the pupils] are extraordinarily resilient individuals; they just get on with things. This is the way it is.

The boys who are currently in the third form who are living under the current state of the restoration, they don't have any natural light coming into their rooms, it's not as though it's boarded up, but everything's protected by gauze so there is light, but it's filtered light, can't get full visual outside. Some of those boys, and one or two of the lower sixth formers who have similar conditions, have actually slashed holes in the gauze just so they can get moving air, and just so that they can actually get a bit of natural daylight. Unfortunately the price for that is they now get dust intrusion. So the gauze is very good at protecting from dust, it's not so good for letting light in. So the boys do get frustrated, that's for sure, but actually they don't exhibit it too often. They're actually amazingly accepting.

But I find that boarders per say are extraordinarily accepting, very, very tolerant, I think that's part of their nature. That when you are living in a confined space with a number of boys who actually you hadn't met before and you come in and you spend five years of your life with them, that inevitably

Knowing the academic and seasonal rhythms of life for the students would help to plan particularly intrusive restoration work around those times.

The windows restoration was very difficult to work through, but having people who were willing to work with you made it more manageable.

there are spats and fallings out. At the same time, they develop a great sense of familiarity, comradery and tolerance and even respect for each other. You can see that same process going on in their relationship with their surroundings as well. This is the way it is. But when the sun shines and they're all outside playing rugby or football and touch rugby or lounging around etc. it's a totally different environment. So I think there is a natural rhythm that goes on here and I suspect the restoration affects them most probably in the short period up to Christmas and the period from Christmas to Easter which coincides obviously with the winter and going into spring and spring becomes much, much easier. But I think certainly in January, February, March, they are the times which probably their patience is tested most. So there is a rhythm of it, now the condition of the restoration won't change between September and June, but actually their response to it does change, but that is often seasonal I think more than anything else.

So there is a partnership involved and it does really hit hard where there are more people who are very, very definitely resident. When we moved in the whole of the North front was scaffold in shrouds, and you couldn't see daylight, it was incredibly claustrophobic and our windows were being ripped out and replaced across the whole there. And the boys had to go through that as well as did staff and as did office staff as well. That was massively intrusive; we were on a short fuse at times over that one. But again, working with people made it very, very easy, and if they responded when things went wrong, and things did go wrong, sometimes in the middle of the night. In fact you know then you could work through it.

I think the South front is a massive meeting place, I think it has a huge psychological

The changes the restoration has forced onto the school community have led to changes in the school patterns. Examples of the Marble Saloon/South Front social area and the traffic patterns through the North Front.

bearing on the whole school. And you can imagine that when that was shrouded and closed, that was a major, major issue for the school community. And at the moment, the dining room is in darkness, I think that still has an impact on them, but not to the same degree as when the Marble Hall was shrouded, and the South Front steps were effectively shut, because they had nowhere to go. That was very much the heart and pulse of the school, particularly from the senior end. And I think having [reopened the Marble Hall and South Front], I don't think we've ever recovered what we lost. It's been an interesting thing.

The new social center has continued to move pupils and activities away from the main mansion.

I think that we used to have everybody going through the North Front entrance, when the North Front closed, then everybody had to go down the Colonnades [and through Temple House], and we've never recovered that sense of privacy about the [Temple] House. So actually restoration has had minor tweaks on different things. So I think that there have been changes in school consciousness [caused by] the restoration; that is a legacy to the restoration. I think that the school has moved on, the fact that we now have a social center which is away from the main building, is being able to draw people away from the mansion now. That also will have a consequence for people's attitude, because I don't think that South front thing has ever fully recovered, but now the distraction of the Social center may mean that we'll never be fully recovered. Is that regrettable? Not necessarily, but it's a change, it's a discernible change I think which is more psychological and social than it is explicit.

The restoration has slightly changed the actions of the students and affected their perceived sense of freedom.

It's rather like putting the statuettes inside the alcoves of the Marble Saloon, there are some pretty rude appendages, they're teenage kids, and they're going to do things. But actually it cramps their style. We've now put CCTV cameras in different places, is that

Pupils and alumni of Stowe are referred to as Stoics.

The restoration process has made the house feel a bit more museum-like than before.

To some pupils it is just a building; others recognize the beauty of their surroundings.

How did the restoration affect prospective pupils?

because we're more heritage conscious? Very possibly. Having done that, does that therefore cramp the style of Stoics? Not that they are necessary stopping doing what they shouldn't have been doing, but it does actually change the way you behave. They're more aware that A. they're being watched perhaps, and B. you've got these things around which everyone's telling you are very valuable and very fragile. So the tennis ball that's stuck in the Marble Saloon roof, is that ever likely to happen again, no because it's no longer a games room. Yet my son used to go in there with his friends and slide around and play slide-y games all over the floor. But I think from a student perspective, as a boarder, I suspect that it has a different feel... it's become more a museum than a lived in building.

But the odd thing is that when you're talking about a school that is a sort of seventeenth, eighteenth century mansion in 250+ acres of amazing landscape that for some of these boys it is merely a building, regardless of what we do with it, it is merely a building. Others are rapt with it from the very, very beginning, other become rapt with it as they grow through the school and some don't discover their love of the place until either the day they leave or after they have left. As they realize actually what they're missing, so there are various different human emotions and human reactions that go into the building anyway, let alone how that is complicated by restoration (Interviewee 2, personal communication, April 7, 2011).

Participant #8 As I said, it was difficult for the school trying to manage and work round the restoration. Initially, it was thought that we might lose prospective pupils for a couple of years because all that parents saw when they arrived was a building under scaffolding, but in fact our admission numbers never went down. It was sold by

The restoration looks beautiful and has greatly improved the aesthetics of the house, but is it practical and functional as well? In winter the windows do not keep out the cold and in summer the roof retains too much heat.

saying “this is the way forward, we’re improving and restoring it for the future generation” (Interviewee 8, personal communication, March 25, 2011).

Participant #2 So it strikes me that there are tremendous inconsistencies. And if you look at living with [the restoration], it’s interesting how the restoration does impact life. All these windows on the front of the House have been restored with unbelievable glass which you dare not break because it’s incredibly expensive to replace. It’s not normal glass and all the windows have been restored to nineteenth century standards. Fantastic.

But we’re facing north here, so when the north wind blows, which is horrendously cold, you’ll find that all the boys in the residence on the north side of the house, shiver, because the windows are full of gaps. They whistle through the sashes, and therefore you’ll see that the boys will wrap towels [to] block [the wind]. It looks horrible, but you can’t do anything about it, because it’s the only way of staying warm. Despite the fact that the roof has been restored to fantastic effect, and therefore retains heat, that’s a huge benefit to the school I’m sure in the heating bills. It retains heat like there’s no tomorrow. In fact when the wind blows it’s frighteningly cold and you can’t do a thing about it. Then the converse is true, that actually because the roof restoration is so successful and retains heat that when it’s in the middle of summer, it’s so hot upstairs the boys have got every window open, they’ve got every door open, they’ve got every fire door that they shouldn’t just to get some air movement through their rooms and in the corridors.

So it’s extraordinary how the restoration can have very, very different effects, which in terms of aesthetics, there’s no doubt, it looks

great, but in terms of actual living, in the winter with the north wind it can be desperate, and in the heat of the summer it can also be desperate.

Greater pride associated with living in a nicer place (post restoration)

I think from the boys' perspective, I suppose from our perspective, there's greater pride in living in a place that's tidier and cleaner and not falling to pieces, so it does look and feel so much better.

It's not been easy, but it's not been impossible. I think the benefits outweigh the process, there's no doubt about it. And actually school boys inevitably look back at hard times and make good stories about them (Interviewee 2, personal communication, April 7, 2011).

Stowe House Preservation Trust

As an educational organization, Stowe School was not eligible for preservation grants by the government and other organizations. Therefore, in order to ensure the restoration and continued existence of Stowe House, the Stowe House Preservation Trust (SHPT) was formed in 1997, its purpose "to restore and preserve Stowe House for the benefit of the nation and the public"(Bevington, 2002, p. 26). The SHPT now owns Stowe House on a ninety-nine year lease, though the school still retains use of the building as tenant. Along with the restoration of Stowe House, the SHPT has also been charged with managing public visitation to Stowe House. Public monies awarded to the restoration of Stowe have brought increased responsibilities to open Stowe to the public for tours and visitor education.

Visitor Services. Most of the participants interviewed felt that the professionalism of SHPT's visitor services could be increased. The data also revealed that SHPT has made progress in this area. They have administered a questionnaire to visitors in an attempt to find ways of improving their professionalism, but more work is needed. SHPT has developed

special activities and programs in the past such as a children's trail, but they should focus on developing more programs to attract more visitors. Also, more staff and volunteers are needed to help bolster the resources and professionalism of the organization.

Stowe House Preservation Trust (SHPT) needs to build up visitor management and visitor services.

This example shows that SHPT has progressed in their professionalism, but there is a need to continue.

The SHPT recognizes the need for more professionalism, but it is difficult to achieve without support, more volunteers etc.

Participant #4 To be honest with you, I think we're now stuck in a time warp of what we did 14 years ago. We haven't looked at it and said how can we do this better? So that's my next challenge, that as the restoration work starts to draw to a close, we try and build up our visitor management and visitor services. So that we give people something better for their day. We are asking them to part with the money to come into the house, so we need to make sure that they're getting a good experience. We've done a children's trail around the house, which is useful. We need to have more things like that that encourage people to discover the house and then go away thinking, "Oh I've learned something today" (Interviewee 4, personal communication, April 7, 2011).

Participant #3 The till [cash register] was originally a little box with money in and we would just tally people off. We'd bring up a basket from the office and spread it all around the table. It did mean that my elderly stewards would be struggling up the stairs with all this stuff. That was my first thing I did, change that till [to an actual cash register]. Ironically now I've been told by the school they don't like [the till] and want me to hide it each day (Interviewee 3, personal communication, April 7, 2011).

Participant #1 I want the House to look as professional as possible, but currently we don't have that many people. So it's quite hard and I'm trying to recruit volunteers as much as possible so the house operates as what the public would expect of a heritage property.

Stowe House Preservation Trust (SHPT) is trying to meet visitor expectations.

I think visitors are used to seeing places like Stowe in a specific way which involves lots of people on hand to ask questions and I think they're quite used to people being around for security and things. And something I've found when I started back last May was the fact that we really didn't have that many people on the ground. Once a visitor has left [the visitor assistant] in North Hall, they might not see another member of staff until they leave, which I thought was too long for a visitor to walk around without anybody else around. Also they could get up to some mischief if they wanted to. So there's the aspect of increasing volunteers, and trying to operate in a more professional manner, so it looks a bit better.

I think the main [improvement] has been trying to get more people on the ground, and getting a higher level of customer service. I think that one person and a till trolley [cash register] is something that I really try and get away from as much as possible.

SHPT ran their own questionnaire in summer 2010 to determine visitors' views toward Stowe.

I ran a questionnaire last summer to try and get some feedback from visitors because really we had polar opposites. Some people came into the house and they thought it was wonderful and they were here for more than an hour, which is quite a long visit to a house really, and they really enjoyed it and they found there were things for their children to do, there were activities in the interpretation centre, lots of things for kids as well, and they'll go away saying, "This is brilliant this is more than we expected." And on the other end of that we have people that came in walked around in about 15 minutes and then left saying, "That wasn't worth the £3.80 or what we paid to get in." So I really wanted to get to the bottom of why this was, why there was such complete change in attitudes. So I did a visitor survey, and it came back really rather positive. It wasn't as big a problem as I had originally thought, which I was really

Survey results were mostly positive. The findings mostly brought up issues of the Stowe House Preservation Trust (SHPT) and the English National Trust (ENT) working together. It revealed how the public perceives Stowe as a whole rather than three different entities.

SHPT has attempted to provide different types of offerings in order to attract more visitors, although it has not been as successful as hoped. Visitors tend to want to see more rooms rather than the same rooms re-interpreted.

Plans for summer 2011 to observe whether visitors are more interested in exploring the open house or taking guided tours.

pleased to find. And the main things were actually more to do with the National Trust and the SHPT together, so it was things like signage from the tea rooms to the house, people weren't aware of where the house was situated within the landscape, which is something that by putting up a couple of A-board signs in the gardens, both at the North and at the South Front, I hope to alleviate slightly.

I did run restoration tours, in the summer of last year, but the take up wasn't so good, I'm not sure if it was day of the week that they were operating or if people weren't as interested in restoration tours. I think they like to see something that they wouldn't have always got to see rather than taking them round the same space, but interpreting it differently. It tends to be what else can we see room wise, rather than anything else.

It will be interesting to see, going forward if they decide to just run tours, or have the house open 12:00-5:00. I think this summer I might try and open the house for more tours, just to see how they go. I think some are concerned that you're spreading the same number of people who would come to the 2 o'clock tour, over more tours, so there would be little point in staffing that. However I think as a visitor of other properties, if the tour isn't in the next 15 minutes of when I arrive, I'm not going to hang around for it. So I think there's probably advantage to running two or three tours a day, to try and get those extra people that come before and after the 2pm tour, who do miss it (Interviewee 1, personal communication, April 11, 2011).

Participant #4 I think what I'd really like to get sorted out is visitor management, and actually bringing visitors here. We do work well with the National Trust (NT), but somebody coming here for a day doesn't

have that much time, so they've got to be selective in how they spend their time, we need to tell them much more clearly, that the house is well worth a visit. I think we should be saying, "Your visit to Stowe isn't complete without seeing inside the house." Whether that's enough to entice them in, I don't know (Interviewee 4, personal communication, April 7, 2011).

New Interpretation Center. Stowe House Preservation Trust's (SHPT) new interpretation center is to open in 2012. The development of the new interpretation center is in collaboration with the English National Trust's (ENT) New Inn visitor center which opened in March 2012. SHPT's interpretation center will bring many changes to how visitors interact with Stowe House and will potentially help the organization operate more efficiently within the areas of security and crowd control.

Participant #4 The next stage is to restore the cellar and make that into the interpretation centre... That will be a much better facility that will tell the story of the house (Interviewee 4, personal communication, April 7, 2011).

This may be a British idea, but many house museums charge visitors in addition to the admission cost for a house guide. Participant has found that visitors like information that they do not have to pay for. So SHPT has tried to provide more free information.

Participant #1 With the new interpretation structure that's being developed for opening in 2012, there's very little I can do in the meantime. I kind of feel like I'm waiting for that to be done. But on the interpretation side, I've found that visitors like to have information that they don't have to pay for. Which I think is a problem at lots of heritage attractions, people aren't always that keen on paying extra for things. So as much as possible I've tried to produce laminated sheets in each of the rooms with just four or five facts on it, to try and give a bit more interpretation. Photographs of how the rooms used to look, and display boards, but at the moment they're on quite a low level and I don't think they are as professional as they

The interpretation's current level of professionalism is not very high, but it is hoped that the new interpretation center will solve this problem.

should be, but it's the best I can do until the new interpretation strategy is sorted. Then we'll be able to pump some money into room interpretation, which I'm sure they've thought us as part of the plan.

Participant hopes that the new interpretation center will solve not just problems with interpretation but also security and crowd control.

2012 when we have our new interpretation centre, security will be easier because you will be controlling people through the South Front and you're not really letting them wander. They'll be no access from the North Front, so it'll be much easier to control really (Interviewee 1, personal communication, April 11, 2011).

Group Bookings. Attracting more group tours to Stowe would efficiently help Stowe House Preservation Trust (SHPT) increase their visitor numbers. Because the open rooms at Stowe are free of excess furniture they could easily accommodate many visitors at once; therefore hosting multiple groups at the same time should work. Currently someone wanting to book a group would have to go through English National Trust (ENT) and SHPT to confirm the reservation. The process could be streamlined if there was one staff member working on behalf of both organizations to make the bookings.

Hosting more groups would help achieve the number of visitors that SHPT is aspiring to, but the current system of booking groups is not efficient.

Participant #1 Group bookings is something that desperately needs looking at. Blenheim has something like ten coaches a day, they have huge numbers, and I'm not saying we should quite aspire to Blenheim because they are just hugely bigger and they have international people come. If you're coming to England you go and see certain places and Blenheim is one of those. I don't think Stowe is currently but it would be nice to think in the future Stowe could be one of those really key English houses that you have to go and see if you're in England.

I think to some extent we should try to work toward more group bookings coming in and being able to have a dedicated person who

A lack of staffing is holding Stowe House Preservation Trust (SHPT) back from becoming as productive as they could.

It may be best have one person working for both SHPT and English National Trust (ENT) to coordinate all group bookings rather than the current system of two different coordinators.

The layout of Stowe could easily accommodate many visitors at once, so multiple group bookings at a time would not be an issue.

handles marketing to recruit in the group bookings and to actually actively process them on the day, meet the coach, bring the people in etc. But I don't know whether that's going to be something that's going to be between the National Trust (NT) and SHPT. If that would work better than having two separate people, because again at the moment, people booking a group to come to Stowe, they come either through us where they just contact us and then we pass the information across the National Trust's group bookings coordinator, who's a volunteer. Or they come through to the NT and then they forward them on to us. So at the moment we've got this really kind of clunky system, of saying "Oh you must contact the NT as well." From the outside, people probably think "Why, I've contacted you isn't that enough?"

I think that probably doesn't look massively professional if you have to come through the two parties to be able to book in a group that must be quite annoying, I should think. So that would be something that I think needs looking at in the future. And I think we could get a lot of groups. Stowe doesn't actually have any furniture which means that as people come through the house, you don't have the limit on numbers that you might have on other places where it gets bottlenecked and clogged up, so realistically, we could be taking quite a few groups a day if we're open for free flow. Even tours you could have tours running behind each other, like they do at Blenheim. So I think that's something that we've really not tapped into all. If you look at the number of groups that we have coming in any one year, they're not high at all. Our main thing is June and August, strangely not July, not sure why and just a few others dotted around, it's really not enough. You'd expect us to be able to take more, but I think that's marketing issue, you wouldn't know we were open (Interviewee 1, personal communication, April 11, 2011).

Security. The presence of Stowe School within Stowe House creates a complicated situation of welcoming the public to the house as visitors while trying to protect the privacy of students. The open nature of the house makes it difficult to manage the movements of visitors. It is hoped that heritage visitors are not the type of people who would cause harm to the pupils, but it is a threat that must be managed. The participant suggests that more of a staff/volunteer presence in the house would help to deter visitors from wandering off the visitor route.

The open nature of the house makes it easy for visitors to find their way to private areas without even meaning to or worse because they are actively trying to reach the residence area.

The security solution suggested is to increase staffing levels and vigilance of staff.

Example of a visitor found looking through the kitchen; they had walked past a stanchion in order to enter the kitchen.

Participant #1 But in terms of the security issue, I do find visitors wandering around the house when the house isn't open because of the nature of all the doors being open for students and for everybody who works on site, it means people just walk in. And so you do have that split between those people who won't venture outside of where they're supposed to be and those people who are quite happy to nose around at their leisure and they don't worry about security at all.

From a security aspect, even when we're open 12:00-5:00 when the school isn't here, but we still have children on site. So I think it's important to keep an eye on all of our visitors. We should know where they are, they shouldn't at any point be able to walk off. And at the moment they could walk off, that's something that really worries me. This is why I think we need to massively increase our staffing levels of volunteers to make sure people don't walk off.

I found someone standing where they wash up the stuff from dinner, the other day, they just walked down the corridor and walked in and were looking around going "Wow this is a huge system" and it's just like "What are you doing in here?" I had put a stanchion up but they just walked round it. They had not

Points out that everyone is curious, usually not from a malicious point of view, but people are intrigued by the behind the scenes. Perhaps there is a way of utilizing this tendency to attract more visitors by offering planned, special behind the scenes tours.

Participant is hoping that the changes with the new interpretation center and the change in orientation with New Inn will solve these problems. Perhaps they will aid in their solution, but most likely more work will have to go into solving the issue of security.

Participant hopes that heritage visitors do not have malicious intents, but that from a child protection point of view it is a way in for someone looking to do harm which means security does need to be addressed and managed at a higher level.

seen anyone since they'd come in, and so there was no staff around as far as they were concerned and why not have a sneaky look. And to some extent I think everybody would, probably not in the kitchen, that's not the most interesting part of the house. As a visitor I can appreciate why you might like to look behind closed doors, but it's trying to stop people from looking behind closed doors that's the issues.

And we even have people who come in from the interpretation centre corridor downstairs and they come up in North Hall and they're like, "Oh is there where we buy our tickets? We've already looked around." And you think "How?" There's a sign on the door that says no access to Stowe House visitors, but people still just come in, they don't [pay attention.] And I kind of wonder if you were at Blenheim or Chatsworth, would you do that, would you just randomly open a door and see if you could get in, I think not so much. Because there's a huge staff presence, you'd think you'd get found by someone. Where here, because we're quite low level, people don't think they're going to be found.

Security is a huge issue that I hope will be addressed by having more people on the ground, more visitors' assistants and more room stewards. And hopefully with the opening from the South Front, people will be brought in and managed in a way that means there is less escaping into other areas of the house that aren't open.

You kind of hope that heritage visitors are not just people who are going round the supermarket, you're not getting absolutely everybody. You are getting a section of society who hopefully aren't terribly malicious. They're heritage people, they've come specifically to see the house, they've come at times that are quite awkward, 2 o'clock tours or 12:00-4:00/5:00pm, and

they've come specifically to see the house. So you hope they aren't the kind of people who are going to wander off. But of course actually looking at it from a child protection point of view, this is a school that's open and so actually it's a way in isn't?

So I think it could be at times quite worrying with visitors coming around. And that's another reason we need to look more professional because you know we are looking after the children here because when there are students here, nobody walks off because everybody's accompanied by a member of staff at all times. So in term time, there isn't a security problem I think, but in the holiday time, we need to make sure we're still looking after those children and like today who've come for football camps, we need to make sure that they're as protected as the children who come here [to Stowe School]. And I think potentially at the moment with the free flow system and the fact that I've not got as much staff as I would feel comfortable with, I don't think they are necessarily as protected as you would hope for a place that otherwise operates quite well.

Everything's pretty much key-padded, but there are still areas where you could walk off through corridors and get quite far. It's things like that that just worry me ever so slightly. But I think it can be solved by having more people on the ground, which is why I'm really trying to recruit as much as possible (Interviewee 1, personal communication, April 11, 2011).

Marketing. Historically, Stowe has not done a sufficient job marketing itself to the public. A big problem identified by the participants is the lack of public awareness of the days and times the house is open. Because Stowe houses a wealthy boarding school the public may think they cannot visit; that it is private or only for the privileged. There are

definitely public perceptions that must be demystified in order for Stowe to receive more visitors, but they also must have consistent opening times that are easily accessible by the public. Effective marketing would increase the public's awareness of opportunities to visit Stowe.

A more user-friendly way of finding out about the opening times of Stowe House should be developed.

There hasn't been a lot of active marketing of the house by SHPT, kind of tagging on to the marketing of the gardens.

Participant #4 We've certainly got to market it better. We push out a leaflet every year; we have a website that explains how the place is open. I don't think it's up there in the top league of websites to attract visitors (Interviewee 4, personal communication, April 7, 2011).

Participant #1 I think a wider issue that we have at Stowe, is that people just aren't aware that we're open. And I was quite sad to read the [new] National Trust (NT) handbook for the country and under the gardens section there's no information about the house, and in all previous years it had said, "House open by Stowe House Preservation Trust (SHPT)" and then it had, "Please call this number or check our website for opening times", and that's not there this year. Not quite sure why that is, I don't know if that's a Stowe decision or if that's a decision from higher up. But that's been taken out, and that's something I'd like to see reinstated next year, because that's where most people would find out we're open. They're coming to see the Gardens and they just notice that tagline and, go "Oh maybe the house is open?" If that's not there, people aren't aware.

It will be interesting to see our visitor figures this year, if that affects it at all. If that could be seen as one of the factors if we have lower figures this year. But that could be for any number of reasons really. So that's another thing (Interviewee 1, personal communication, April 11, 2011).

Attracting new and repeat visitors. One of Stowe House Preservation Trust's (SHPT) goals is to receive 25% of the garden visitors at the house. Currently Stowe House is only attracting 5,000 per year, while the Stowe Gardens attract about 80,000 a year. In order to keep visitor numbers high and to achieve the goal of 20,000 visitors per year, Stowe must think about how to attract new and repeat visitors. However, the visitors need a reason to visit and then to also return. Marketing will play a role in attracting new visitors, but planning new programs and events will help to attract repeat visitors.

Visitors need a reason to return, there must be new things planned to attract the visitors again.

This participant is looking to get 25% of the visitors to the gardens to visit the house as well, about 20,000 per year.

Participant #1 I really think it's important that we get people to come back to Stowe, I think there is this thing of once you've come you ticked it off your list of Houses you need to see and then you just never come back. So I think really we need to start looking toward more heritage themed events and talks and things to try and get people through the doors And just trying to open other parts of the house to try and lure people back in (Interviewee 1, personal communication, April 11, 2011).

Participant #4 My concern now is that we have to start to think about bringing visitors in. We currently attract 5,000 paying visitors a year. About, I think it's about 80,000 people come to Stowe Landscape Gardens every year, only 5,000 of those come into the house. For example, the heritage management plan (see Appendix H) that we drew up, compares us with a place called Stourhead, down in Wiltshire, where there's a similar house, sitting on the edge of an eighteenth century park and lake. And about 25% of the visitors there go around the house. So if we could get 25%, that's about 20,000 visitors, we'd probably take more, but I suspect in terms of the physical number of days we can open, and having to have guided tours only in term time, that's about the maximum. We probably wouldn't get more

than about 35,000 people around the house. But we're still a very, very long way from that, with only 5,000 a year coming in. So how do we do that? (Interviewee 4, personal communication, April 7, 2011)

This participant is fearful of the 20,000 per year figure as they see it as unrealistic.

Participant #3 [One of my two fears] is that 20,000 [visitors a year] figure and in some things I've seen 30,000 and I've changed it quite rapidly. Even if everyone else is saying 30,000 in print it's going to say 20,000 in main documents. It's about meeting people's expectations, so if the Heritage Lottery Fund (HLF) is going "Ooo 30,000" and if in five, six, or ten years time we're still on 10,000, I'd rather we were nearer to 20,000. So I don't care if World Monuments Fund's (WMFB) been saying 30,000, anything I see in print I change to 20,000. Because if we go beyond that, that's fine, that's great. I mean I'd rather put 10,000 and try and get 12,000. Anyway, so that's my fear (Interviewee 3, personal communication, April 7, 2011).

Volunteers. Stowe House Preservation Trust (SHPT) has attempted to increase the number of volunteers at Stowe House, as they prepare for the opening of the English National Trust's (ENT) New Inn visitor center and the new SHPT interpretation center. This is a challenge because more volunteers are not necessary until there are more visitors, but it would difficult to attract more visitors without increasing volunteers. As SHPT begins to make the switch to operating solely with volunteers they will need to recruit more volunteers and develop a system for managing the professionalism and reliability of volunteers.

SHPT is attempting to increase the number of volunteers.

Participant #1 We went from having no volunteers to now having about nine. I only started looking at volunteers just before the summer last year [2010]; because there was so much else I had to get a handle on beforehand.

I did find it quite frustrating, that if I didn't actively recruit, there was nobody else doing, so it's kind of been left a little bit until I got back now and now I'm really trying to up the ante a bit and trying to get some more volunteers and I've had three new inquiries in just the last couple of days. So it is something that we're improving on.

The problem with increasing volunteers is that they are not needed until visitor numbers increase, but visitor numbers problem will not increase until volunteers do. It is a difficult cycle to manage.

But when [volunteers] come here and they stand in the rooms, there actively aren't that many visitors for them to talk to, so it is that circular kind of thing. They think, "Why am I here? There's no one to talk to." Then potentially they do not come back, I mean so far everybody's remained with us that we've took in as volunteers, but I just worry that the more people we get, then we're going to have the issue of well there's not very much for me to do while I'm here. So it's trying to handle that kind of increasing visitors through marketing and increasing volunteers and trying to do it at the same levels so we can handle it. At the moment I struggle to cover just two visitors assistants and a guide on a weekend. I struggle to find people and often it's me, I'm in pretty much every weekend we're open 12:00-5:00, just because nobody else is around, or they get a better offer. So they'll say yes at first, but volunteers will often get a better offer.

Unfortunately, volunteers can be unreliable or have other commitments that take precedence over their volunteering commitment.

It's actually hugely time consuming in itself and a huge part of what I actually do, trying to manage people into work. And the fact that they pull out at short notice or they go on lots of holidays, which isn't terribly useful, or one of our guides only wants to do one tour a month. So that's good, because at least it's one tour a month, but it's not necessarily useful when we've got huge numbers of groups coming in and I could actually use that volunteer much more on the ground, so it's trying to fit in (Interviewee 1, personal communication, April 11, 2011).

Stowe House Preservation Trust (SHPT) is planning to make the switch from paid tour guides and visitor assistants to an all volunteer staff.

Currently not enough staff to run the way that they should. More volunteers would help, but could potentially lessen the professionalism and standards of customer service.

Participant #3 And bearing in mind we're all going to be running by volunteers. So next January, we're going to be trying to run on volunteers, so we are recruiting. At the moment the guides get paid and the stewards get paid, so we're trying to phase that out. Which means we have to get more people, but volunteers are a lot of management. I mean [the National Trust is] trying to get 300 before New Inn opens. So a lot, lot, lot going on.

I've done this staff structure recently, we can't go on with just the two of us and few helper-outers, and equally we can't run entirely on volunteers because of the professionalism involved and we want people turning up every day. We want it to be their jobs, we do want a certain amount of people to be paid, and then volunteers are added extras as you can never rely on volunteers. That's where the whole thing falls down, the added extra is volunteers, so that's the kind of the next stage that we're working toward (Interviewee 3, personal communication, April 7, 2011).

Staffing needs. Stowe House Preservation Trust (SHPT) currently has two full-time employees, a few paid guides and a growing number of volunteers. The volunteers that are being recruited will help out greatly with visitor services, but there are other positions that should be filled by qualified and dedicated individuals. SHPT needs a qualified marketing person who is enthusiastic about Stowe and has creative ways of marketing the house to the public. They also need a learning officer who works with the local public to engage them with the activities at Stowe. Having this community connection will help Stowe to attract repeat visitors. A group bookings administrator should also be employed to jointly manage SHPT and English National Trust (ENT) group bookings in order to streamline the process.

*Positions needed:
Marketing position
Learning Officer*

Participant #4 We actually need a marketing person, working with the National Trust (NT); we need a learning and development officer or an outreach officer, working with the schools. Now the [community engagement officer] from the NT does a lot of that, we work with [them]. But it will be fundamental; I should have said for the cellar interpretation centre, we're making a bid to the Heritage Lottery Fund, the national funding for heritage attractions, to fund that building of that facility. They will require us to have a Learning Officer, someone to liaise with the local community.

Possibility of using student work or internships to achieve the staffing levels necessary.

I think we're quite lucky in a way in that the Stowe House Preservation Trust (SHPT) gets me relatively for free, the school pays half of [the visitor services manager's] salary. I think we need an operating budget of £50,000, we could staff up to levels we need. We've made great use of students; I'd like to carry on doing that. I've actually made more use of student placements and assignments, we had one student did a marketing assignment, wasn't terribly good, but they did highlight some opportunities. It might be a placement through the summer, which really is the wrong time, because the summer then everything is in place. We need a winter placement, of someone who's interested in marketing. Perhaps that's how we do it; we employ people part time, and perhaps share their resources with the school. So we do need to staff up (Interviewee 4, personal communication, April 7, 2011).

Governance Issues. Due to the complicated threefold partnership at Stowe, a variety of committees and governance structures have been established to manage and guide the relationships. However, the participants revealed that the governance structures at Stowe have at times held them back from progress. Many of the individuals on the committees and boards are those who have achieved prominence within their fields and have an appreciation

for Stowe. While they are genuine, in some cases they simply do not have the time to devote to Stowe. The boards and committees would benefit from a restructuring; either leave the personnel as is and reduce their decision-making authority or restructure the groups to include individuals on a local level who can be more involved.

Trustees of Stowe House Preservation Trust (SHPT) have been given decision making authority, but they are not as closely involved as those who work at Stowe on a day to day basis.

The SHPT board of trustees has been structured to include prominent individuals of society somewhat related to preservation or country houses.

Participant describing the quarterly meeting process of the SHPT board of trustees.

Current members do have an interest in Stowe, but because of other time constraints and responsibilities they are not able to give Stowe the time and dedication it needs to be great.

Participant #3 That's the other thing that makes me cross every now and again, people who just dip in and out of Stowe. Like the [trustees of SHPT], have these ideas, but we're kind of here on a day to day basis, and this is our job, this is our livelihood, and I think that's an odd sort of scenario. Everybody feels that about trustees, schools, anywhere that has trustees or governors. They're not [closely involved], they're the great and the good, and they're there for the kudos on both sides. But half of them wouldn't recognize me.

There's a board meeting on the day before you [the researcher] go. They'll send out the papers next week, they'll read through them, they won't have thought about Stowe for the three months [since the last meeting], whatever. They'll read the papers, they'll come with a vague idea, we'll flesh it out, they'll make a decision, and they'll go away again for another three months. That's how it is, that's not even me just underestimating the situation, that's how it is. But you could say that about the school governors here, they're all the great and good and they all have other jobs.

The higher you go up socially, the more prestigious it is; it is the great and the good that have other things they might be doing. Like [the trustees], must easily have the same position on six other something or others, easily, because it's the type of [people they are]. And the type of person you get to join governors or trustees, they're all the same people, so they're all doing the same six or

seven jobs, so you have to think “Oh god, where am I today, oh yes right, I’m at Stowe, so I’m thinking about...” That would be me as well, I’d be going, “Right, okay, what am I doing today?” It’s not a criticism, because everyone’s been in the same situation.

Stowe House Preservation Trust (SHPT) must decide what type of board they want, a dedicated, involved board or one that just rubber stamps decisions and is there for propriety reasons. Either less responsibility should be placed on the Board of Trustees or it should be restructured to include more local, dedicated individuals.

One of our really active Trustees, lived in Buckingham, and that’s what makes the difference. The nearest person now is 13 miles away and quite frankly they’ve got better things to do. So in terms of just getting checks signed we now either have to send them out, which we can’t send checks out through the mail, which mean there has to be someone nearby to sign them. But there are just two of them; everyone else is miles away, predominantly London. And I don’t think that helps, whereas you see the smaller the organization, or the lower down the scale the organization is, the more local people you get and the more active that it is. And that’s kind of the irony of this place, it’s just the great and the good, and it’s a shame you’re missing the Stowe Advisory Panel, because that’s just hilarious, that is the great and the good, who have a view on Stowe and are not affiliated with either National Trust, or the school, or Stowe House Preservation Trust (SHPT), they’re just people who love Stowe. But they are the great and the good, who know everything about Stowe, and they’re just trying to make decisions, hilarious, it’s just hilarious (Interviewee 3, personal communication, April 7, 2011).

Funding. Stowe House Preservation Trust (SHPT) has received funding for the restoration of Stowe from a variety of sources including: Heritage Lottery Fund (HLF) grants, Robert Wilson Challenge Fund through the World Monuments Fund Britain (WMFB), English Heritage, the Getty Grant Programme, the Paul Mellon Estate, the Country Houses Foundation and other private donors. It times it has been challenging to work with

these donors or to meet the stipulations placed upon the money given. Without the generous support of these donors, the restoration would not be possible. Attached to the large amount of public funds received by SHPT for the restoration comes a responsibility to allow public access to the house.

Heritage Lottery Fund (HLF) grants come from the Ministry of Culture, Media and Sport.

Stipulations for receiving HLF grant money include ensuring public access and being open for 100 days per year. The requirements make it difficult to apply for subsequent grants because if you've already done all the interpretation you can do, they will most likely not fund the subsequent project if it does not involve interpretation.

Participant #3 2000, when they get their first HLF grant to do the whole of the North Front, basically almost 90% they got from HLF to do the whole of the North Front. So the key thing about HLF funding, is that they'll give you the money for the works, but they also want you to have money for interpretation. That's their key thing, because it's public money. That's fine, I don't have a problem with that, that's how it should be. However there were some people working for Stowe House Preservation Trust (SHPT), historically, who are all about the build. And don't see beyond that.

We have to be open 100 days a year, that's what the HLF asked for after Phase 2. English Heritage asked us to be open 40 days. That's out of the 100. Each time you go for an HLF bid you have to be careful of how much you offer because if you say, "Okay we're going to do the entire interpretation for the whole house this time round." So they do that and then we apply for the next funding for doing the State Rooms and they'll say, "Well what are you going to do for the interpretation?" And then you'll go, "Oh, in the last bid we kind of did all that interpretation." And then they'll go, "Well, we're not going to give you the money because you've given away all your interpretation ideas." Isn't it funny? I mean I do understand where they're coming from because they are all about interpretation. So we have to be really careful if we go for HLF bids not to give too much away if we want to go for another one.

Most recent 2006 and 2009 Heritage Lottery Fund (HLF) bids have failed, most likely because they have not focused as much on interpretation as they have restoration.

The 2009 HLF bid was done in partnership with the English National Trust (ENT), because the changes New Inn would bring would link the two organizations' interpretation together. They were collaborating, but they were separate applications. They had similar interpretation plans, but the ENT received a HLF grant, while the Stowe House Preservation Trust (SHPT) did not.

ENT had done much more community engagement than the SHPT which strengthened their application.

I think that the past couple of our HLF bids have failed because the application's like, "We'd like some money for the restoration please." Basically for all intents and purposes is what it says, rather than saying, "And we will welcome the public with open arms for 160 days of the year..." It does say that, but I think they saw through it and it was all a bit of rushed job to do it when we went for that money in 2006.

And even this current one when we lost out in September 2009. We were encouraged to leave our Interpretation Plan [as a part of the HLF application] woolly [unfinished/rough] because so was [the ENT's], because we were working together. We just hadn't fine tuned things yet, because we are, at the end of the day, different organizations working in different spaces. Ironically, theirs was just as woolly [unfinished/rough]. But [the community engagement officer] had been employed literally a month before. So although their interpretation plan was weak, their community research, which they'd done a good month before, because [the community engagement officer] is very dynamic, they had done a good month of community work. By the time it came to their round (because we were a bit before them) of HLF announcements, they said "Oh look what we've done already." Whereas for us we're like, "We're going to do this and we're going to do that."

And I think that's what swung it for the National Trust (NT), although their interpretation was weak, [the community engagement officer] had already done huge amounts of work. So in fact it was a bit cheaty, they had already handed in their job, [the community engagement officer] just happened to get here a month before. Not that I'm bitter you understand, all this time later!!

Another reason the 2009 Heritage Lottery Fund (HLF) bid was denied was based on the lack of collaboration between the Stowe House Preservation Trust (SHPT) and the English National Trust (ENT).

SHPT must decide whether or not to apply for more HLF money beyond the new interpretation center. HLF applications are very costly to prepare and funds might be better suited elsewhere than to apply and not get the money. Stowe has already received quite a lot of HLF money and as the participant points out the upcoming 2012 Olympics in London are straining all sources of public funds.

World Monuments Fund Britain (WMFB) through the Robert Wilson Challenge Fund,

Funders like to see joint partnership working, particular the HLF and one of the reasons that it was quoted why we failed the last HLF bid, was there wasn't enough working between the NT and the SHPT.

Once, if we get money for the cellar bar, I suspect we won't go for anymore. Which means we've got to decide that now because then we want all that money for the interpretation right now. Another decision to make. That's another discussion to be had with somebody writing our HLF bid. So that's a funny way of how it all feeds into one another.

The World Monuments Fund (WMF) can be a pain, but they have done it. So instead of wasting £30,000/ £60,000 for yet another application that is sent in, it takes a lot of money to prepare them, then I don't think we should be going for it. HLF is not allowed to think like that [that they've already given so much to Stowe] but I'm sure in this day and age they do. And I don't have a problem with it, because there are lots of other projects, and the Olympics are bleeding everyone dry. That's the key thing, if we hadn't the Olympics, we wouldn't be having this, we'd just go for it, but the Olympics are bleeding everyone dry.

The HLF is not allowed to say don't apply; they have a case worker to encourage you along the way and to help you. I wish they'd be honest and say "Quite frankly you've had £11 million already, you are to all intents and purposes a public school, and you are all about the build and not the interpretation." I'd go yes that's fine, just let's not waste any time on it, let's just move on with our resources, financial or otherwise, to put into doing something else, going somewhere else.

WMFB had through an American donor, Robert Wilson, done this challenge about

put forth a great deal of money during the second phase. However Robert Wilson himself visited Stowe and decided to fund the Marble Saloon rather than the exterior.

raising money for the outside. He [Robert Wilson] doesn't like flying but he came here anonymously and he saw the Marble Saloon and decided he wanted his money to go to the interior rather than the exterior. So he withdrew his money that was doing the outside of which was match funding the HLF money to do the inside. So as [my predecessor] tells it, while it was an amazing gesture, there had to be a lot of double accounting going on because not only had they then got to match-fund the money for the exterior with the HLF money that they'd got, which Robert Wilson's money was matching. He's now taking out, so they've got to raise money for that and Robert Wilson's challenge was if I give you \$400,000 or \$800,000 you've got to match it in £, so this had to be a mass double fundraising, parties and everything, so try and find double the amount of money to keep these projects going, because it was literally on the verge of starting. So there was a bit of double accounting in order to get everything done. And [my predecessor] did tell me, they just had a (metaphoric) heart attack when someone said that. It all worked out, but at the time there was just panic.

Phase 3 did not receive Heritage Lottery Fund (HLF) funding, which is where the World Monuments Fund Britain (WMFB) has stepped in to help fundraise.

Phase 3, was originally going to be Phase 3 and Phase 6, so all of the South Front, and all the State Rooms. HLF encouraged us to break it down, rather than just ask for £30 million or whatever. And so we broke it down and then they didn't give us the money. So that's where WMF (World Monuments Fund) have really stepped in to Phase 3, so they were a bit part of Phase 2, mainly Marble Saloon, hugely in Phase 3. They fundraise, they are middlemen. Which again, not a lot of people know that, and they will take a 20% cut of the money that they've raised.

A little known fact about the WMFB is that they take a 20% cut of all the money that they raise as their payment for being the middleman.

And of course, the library was an added extra because that ceiling was falling down. That

Ironically, the World Monuments Fund Britain (WMFB) did not contribute to the library restoration although their publications promoting the newly restored library claim they did.

Managing the WMFB has been a challenge and they have not always raised the amount of money they said they would.

The anonymous benefactor, who is not so anonymous to the general public, has not been named in print.

had to be done, that was an emergency one, that wouldn't have been done, if there wasn't an emergency that wouldn't have been done yet, so that was as added extra. Which was contributed to by lots of different people, not the WMF (World Monuments Fund) of which they claim and publicize it. One day I'm suddenly thinking, "With all this publicity going out, saying come and see our lovely, new restored library in Easter", I'm thinking "Why's the WMF sending out all these press releases when it was the Country Houses Foundation and others, if any of those find out that the WMF was taking all this credit, we'd have to really manage that", I said. They didn't do anything for it. So managing them, that's a full time job. It's been better than it has been, [WMFB] was here literally every other week, last year and the year before, randomly turning up with people, potential donors, in fact [WMFB's] in on Friday with a potential donor. But it got to a point sort of a year into fundraising, they'd raised like a £1,000, so I'm beginning to think, "Ooo, you kind of said you'd get £6 million for us, you've got like £1,000."

You know there's an anonymous benefactor (AB) that they're matching the money for, the AB that everyone knows about. We said it once, I think that they did a bit of the library as well, and we said to somebody who was coming around, "Oh yes, we have an anonymous benefactor," and they were like "is that so and so and so" We're like, "Oh yeah." That's really funny.

But they are on the Board of Trustees. So they do have quite a powerful sway on what does happen and they do for the whole estate, the golf course, etc. So again sometimes that's a good thing and sometimes that's a bad thing, and you just have to weather it, sometimes you think, "Oh my god, why have we got this person on our board, surely they should not be here." But actually sometimes

The anonymous benefactor does not see themselves as giving money to either the house or the gardens, they are giving it to Stowe, to make Stowe as a whole better

Stowe Development Office raises funds for Stowe House Preservation Trust (SHPT) as well and gives 100% to SHPT. However this is separate of what the World Monuments Fund Britain (WMFB) raises. During the Music Room fundraising, the WMFB had reached the goal, while the Stowe Development Office was still asking for donations. So there was a lack of communication there.

it's quite good because it pulls us all together, because they see it as one estate, they are not necessarily giving their money to this or this or this, they are giving it to Stowe. So World Monuments Fund Britain (WMFB) are matching their bid.

Any money raised by Stowe Development Office, will be given 100% to SHPT. So there's been a bit of conflict over that, WMF (World Monuments Fund) fundraising and our lot of fundraising. The Music Room is a classic example. We had a new person doing fundraising at the school, who was doing stuff for SHPT, and they was getting on everywhere, doing stuff and didn't realize [because they didn't] keep in touch with the WMF. While they are still sending off everything, they basically got all the money. So that's pretty embarrassing, that's really awful. There are little lacks of communication in other areas. But you know, you think as grown-ups, you'd just let them get on with it, but no. So I think that has to be kept an eye on, and the link between the WMF and our fundraising department, just making sure that they do know what each other is up to, because that was quite embarrassing before.

In the meantime WMF is fundraising for Egyptian Hall, and North Hall of which I'm feeding into the research for all those three rooms because they are on the main visitor route. And then soon to be sorting out, the Heritage Lottery Fund (HLF) bid and starting to work on interpretation. Once we start to put the HLF bid in, or working toward it, that will be my key thing, because I will be the person that goes "Okay, we will get six schools in from Milton-Keynes area", we can prove we've done that. We will get ten local history groups in so that will be my responsibility on the interpretation side as well as the interpretation itself. So I know that I will be moved more away from House

opening to research and HLF and interpretation. But equally, I've got to make sure everything's okay this side (Interviewee 3, personal communication, April 7, 2011).

Participant #4 Our funding started out... the one anonymous benefactor who gave £5 million. And there's this wonderful thing in this country for matched funding, so before we could touch his £5 million, we had to have a matching sum, but as soon as we get 500,000 or a million, that releases, a million of his as well, so it doubles the money each time. And that's where this has been particularly successful. They gave £5 million, less a World Monuments Fund Britain (WMFB) commission for their administrative charges of 10%, so that left £4.5 million and of that [the anonymous benefactor] set aside £750,000 to do the Western Garden and move the golf course leaving £3.75 million of his money plus everything that's been matched.

And again have to say huge generosity from Robert Wilson's Foundation and I think a personal interest from Robert Wilson himself. He funded the Marble Saloon; he has put up huge amounts of money toward this. So that's how it works, it was a principal benefactor and matched funding, which got us to around the £10 million mark. And we are now into raising funds to go above that to do some of the interiors, but the £10 million was for the first round of restorations on what's overall a £30 million programme. But I think we're getting there.

If visitors are paying visitors that counts as a business use, which will in turn allows the Stowe House Preservation Trust (SHPT) to reclaim the value added tax on the work that they've done. However this restricts the number of free visitors they are allowed to receive which limits their public access which is required by the public funds awarded to SHPT.

Now we haven't talked about that, in economic terms, we are required to allow a certain number of people in, in terms of what we call public benefit, but the tax inspector, wants to see us charging as many people as possible because this counts as business use. And if we use the house for business purposes, then we can reclaim the value

Even pupils will not be allowed into the new interpretation centre for free because without charging them, they cannot get back the value added tax, which is worth quite a bit.

There is a responsibility to provide access to the public when accepting public funds.

added tax on the work we've done. So for the cellar when we turn that into an Interpretation Centre, I've had to say to the school that there is no, absolutely no non-paying use. So the school pupils going in there will pay a small fee to go in and see it. Because that means that I can get back all the value added tax on the work, and that's worth quite a lot of money to us. Whereas at the moment, we only reclaim 30-39% of the value added tax.

[We] would much rather have people come in free, but unfortunately we can't do that. Foundations such as the Fidelity Trust, Paul Mellon, and the World Monuments Fund as a whole are really keen that in return for the money they give for the restoration, we increase public access. And that isn't necessarily a problem in a school because a school has holiday times, and plenty of country houses in this country are open for very short periods of time, yet still manage to pull in lots of visitors. But it's something that we're not managing very well, that we need to think more about (Interviewee 4, personal communication, April 7, 2011).

Participant #6 There is an obligation when you receive funding from the Heritage Lottery Fund that you will carry out works to be identified, a maintenance plan. So for all three phases we prepared a maintenance plan on behalf of the Stowe House Preservation Trust (SHPT). This says sensible things really. The school here has an excellent staff that can do it for them, and are paid to do it for them. Stuff like cleaning gutters, checking the drains and that kind of thing. Also on a higher level of maintenance, we also suggest that a sort of decennial, quinquennial survey is done, a period of five or ten years, and recommendations are made so that the building is constantly assessed so that it doesn't then fall back into disrepair. You catch these issues while they're early.

These things are then all costed so that the SHPT can allocate money to it and know that they are doing the right sort of things. So that's quite a sort of common approach on buildings like this and also colleges and churches. It's a sort of recognized method (Interviewee 6, personal communication, March 29, 2011).

Collaboration between Stowe House Preservation Trust and Stowe School.

Having the support of Stowe School staff makes the restoration process that much smoother. In order to work in partnership each organization needs to stretch themselves beyond their position and field. The two entities must focus on how they can mutually benefit one another. The Stowe House Preservation Trust (SHPT) is providing beautifully restored rooms for the school's use, while the school adds a new layer of history which SHPT can interpret and use to attract those curious about boarding schools. There have been examples of SHPT and Stowe School collaborating with one another. The Visual Education program, a course taught by SHPT staff to first year pupils, is an excellent example of collaboration between the two entities. The course is designed to instill in the pupils a sense of appreciation for the historical significance of the house and gardens.

Participant #3 When I first got here, I was all about the house, the house was the principle thing. The school didn't exist in my mind. So what I did was fight against the school and you can't, it's too strong a force, and really that's why this place is still standing, it's too strong a force to fight against. So in the end you have to work with it, which is fine, it is much easier, much, much easier.

The Visual Education course introduces first year students to the historical significance of the house and the gardens. Educating them about historic architecture and landscapes,

That means I feed into the Visual Education with the children a little bit more, I help with the Old Stoic events where need be, the librarian asked me last week if we could do a

but also hopefully instilling a sense of pride in their surroundings.

Participant has found those in the school more accepting of them if they have gotten involved with them and helped them with projects etc. rather than only serving the Stowe House Preservation Trust (SHPT).

The school provides part of the atmosphere of the house.

The presence of the school within Stowe House does interest people and some come with as much, if not more, curiosity about the history of the school than the history/architecture of the house.

joint little thing for librarians from the Milton-Keynes area to come and learn a bit more about what we do here, and I said I'd help out.

Actually, it's an absolute pleasure to be working within the school, because then I'm a bit more accepted rather than being a complete nuisance as I think the set up used to be seen. It's just become begrudgingly accepted, but it is very important that we do keep as many people involved or at least acknowledged about what's going on because you're dealing with matrons, and housemasters, librarians, deputy heads, heads, children, and you just can't fight against it and why would you? (Interviewee 3, personal communication, April 7, 2011)

Participant #2 I would say that this mansion feels the way it does because it is a lived in place, it is a very busy, lived in place. And I think when the visitors come through, I think that for some of them it's not a Blenheim which is just somewhere where you go and see pretty things, and actually you don't see such pretty things here, you just see a building that has got a history and continues to have a history. So I think that is a curious dynamic about this (Interviewee 2, personal communication, April 7, 2011).

Participant #1 People really enjoyed being able to see the Gothic Library, and I think that's something moving forwards if we're able to continue to open would be a huge benefit (Interviewee 1, personal communication, April 11, 2011).

Participant #3 We open up in holiday time the Gothic Library, the School Chapel, we do Chapel tours, Gothic Library tours, and we've done restoration tours in the past as well (Interviewee 3, personal communication, April 7, 2011).

Participant #1 People quite like to see the School Chapel, particularly at the Christmas carol concert; people are always really interested in the Chapel and ask all sorts of questions about it. So last summer I did open the chapel one day a week for tours and that went very well, there was a lot of take upon that. And the Gothic Library, people really love the intimacy of being able to go and see the Headmaster's study and feeling as though they've got something out of the visit that not everybody gets. It's almost that sort of privilege position, where they've got that little extra, which makes a visit very personal I think. And that's what we can offer at Stowe, because we are quite a small operation compared to these sorts of Houses that are run by the National Trust. I think that we can offer that more personal service, good customer service and really being able to see what people want and trying to show them what they want to see as much as possible, so we can really do that (Interviewee 1, personal communication, April 11, 2011)..

Participant suggests that the school could play a larger role in attracting visitors through presenting art and participating in theatrical presentations.

Participant #4 The main dilemma we face, school versus heritage attraction, the opportunities the school has in terms of showing off its own art and the art of its Old Boys and the fact that we probably need to think slightly differently about it and put on a lot more events and have at least one day of the year, where the whole place just teams with eighteenth century actors, or actors in eighteenth century costume (Interviewee 4, personal communication, April 7, 2011).

Conflicts between Stowe House Preservation Trust and Stowe School. As previously mentioned, there are also many opportunities for conflict between Stowe House Preservation Trust (SHPT) and Stowe School. The biggest conflict is over physical space. The school's class and event schedules often conflict with the SHPT's tour and program

schedule. In such cases the school almost undoubtedly takes precedent. A participant reported that they would like to see an attitude adjustment by the school toward SHPT. There are those within the school who view SHPT as a nuisance, but as the participant points out, the school would not be enjoying beautifully restored facilities if it were not for the SHPT.

Difficult to find times to open the house for open tour days because of the Events staff is also planning weddings and banquets etc. to take place in those same rooms.

Participant #3 Up until then [May 2005], although the House had been open to the public for free-flowing days and guided tours, it had been managed by the events office. And basically they worked it around their days, so their days took priorities because those were money days, so events and weddings, and when there weren't events and weddings the house was open. So when I came as a new post, as part of a Heritage Lottery Fund (HLF) funded project toward the end of Phase 2, I was then a new department paid partly by Stowe House Preservation Trust (SHPT) and the school rather than being paid solely by the school. I was then set up, not quite in conflict with the Events department, but we were now vying for days, rather than how they were doing it, they were just fitting open days in around wedding days. So now we were sort of fighting over the same spaces.

Then I suppose for the first couple of years here, I was involved in trying to turn house opening around and make it open as much as possible and recruit more people to help out. But then equally, aiming to try to fit in with all the other weddings and events. Ironically when there's restoration work, not as many people want to do weddings, so we can be open a little bit more, but of course, half the money of the weddings comes to restoration. So we're on this funny cycle (Interviewee 3, personal communication, April 7, 2011).

Finding times the house can be open is difficult when planning around the school's schedule and the Events schedule.

Participant #1 My general role is things like working out when the house is able to be open. With the school being here, really

Participant feels that Stowe House Preservation Trust SHPT activities are a lower priority than Stowe School and Events.

rather complicated and I'm not sure everybody really appreciates quite how complicated it is to work out when the house can be open, and things often change at quite short notice. So I try to gather together the main open dates and then try and take out everything where there's a school event or a Stowe School Educational Services Limited (SSES) event, and try and get some idea about when the house is open.

I would like to see an attitude change in future, that is if you come to Stowe as somebody who wants to have a wedding here or you're somebody important, a headmaster of another school or something, you see Stowe differently I think. You see Stowe at its best when it's usually perfectly set out and tidy and it's different for our visitors.

I think to some extent our visitors should see the house as if they were organizing an event here. They shouldn't see the house with chairs stacked up in inappropriate places or not looking its absolute best and as much as possible not having rooms closed at short notice. I prefer to be able to write on the website "The Blue Room will be out of use today." And that's not always possible and it's good to be flexible with the school, but I would like to see the house seen at its best at all times by our visitors. So whenever we are open, the visitors see Stowe perfect.

Participant points out that the house has to be open not because they just want to be open or the SHPT likes inconveniencing the school, but because they have received so much public money. Suggests an attitude change, the school's enjoyment of nicely restored rooms comes with the responsibility of opening those rooms to the public.

The school currently takes complete precedent, they're completely dominate in I think most decisions that are made and I can appreciate that from some aspects. The school saved the house from being torn down, and I think that's something that everyone has in the back of their minds, but I think there needs to be a slight attitude change in the fact that we're not here causing a nuisance. We're not opening the house because we like opening the house, we're opening the house because it has to be open,

because if you're going to have the rooms funded by public money, they need to be publicly accessed and I'm not sure if everybody on site understands that. And as much as we're able to generally work quite well with everybody to open the house, there are times when things are made ever so difficult or we really are opening the house when there's not that much to see because most of the rooms are closed. And I'd like to see that attitude change, that's the main thing.

I'm hoping that as things look more professional and the interpretation strategy and the new interpretation centre and everything is on line. I think that attitude will change, because it will be obvious what we're doing, and it's a big thing. I think actually making a big noise about Stowe House being open to everybody would be better than what we're doing at the moment. Which is just quietly keeping out of everybody's way, I think then it looks as though we're disturbing people, and we're actually we're not. Sometimes they're disturbing us (Interviewee 1, personal communication, April 11, 2011).

The English National Trust

The English National Trust (ENT) was "set up to act as a guardian for the nation in the acquisition and protection of threatened coastline, countryside and buildings" (National Trust, 2011). The ENT is now the largest private landowner in the country. The ENT obtained stewardship of the Gardens in 1989. The participants felt that the ENT did not understand the unique partnership between the Stowe House Preservation Trust (SHPT) and Stowe School. At one point the ENT almost took over the visitor services of Stowe House, however because of many details of the complicated relationship between SHPT and Stowe School it was decided that it would be too much for the ENT to take on.

Participant feels that the English National Trust (ENT) has trouble viewing Stowe as both a daily occupied building and a national heritage site.

The ENT does know how to run national heritage sites, but they do not seem to know how to run a national heritage site and a school at the same time.

While the ENT is competent in running national heritage sites, there are so many small details and nuances to understanding how Stowe School operates, that it would most likely be too difficult for the ENT to manage.

Participant #2 I think that not all the National Trust (NT), but some aspects of the NT find it very difficult to embrace the concept that this is both a national heritage site that the nation should have access to and should have every opportunity to come and admire and enjoy. But at the same time, it is very much a school and that that school has created and molded and made some of this place, not always for the best in some places, we botched certain aspect of it there's no doubt about it. The school is part of this, not that they should be part of the heroic story, but I think it's just part of the story that needs recognition, and a story that needs to be told.

I think that my feeling is only aspects of the NT, not all of them, but I suspect very influential parts of the NT have a much more sterile view, which is a great shame. "Do not touch." So there is an organic-ness to it, which I don't think the NT in some areas can actually entirely embrace. So, I think that's very sad that's not the case (Interviewee 2, personal communication, April 7, 2011).

Participant #3 And then building up the relationship with the National Trust, which to all intents and purposes, people were trying to find ways to make the relationship work, since that was now my job instead of it being incidental. That was my priority, to link up with the NT. I tend to see [the NT] more as my colleagues, because they're dealing with heritage and the school isn't. So I tend to see the National Trust as my heritage colleagues as opposed to my workday colleagues here.

We were on the verge of handing over the house opening to the National Trust right up until the 11th hour, and that always made me nervous because of the nuances that I had taken two years to understand, to try and communicate across to a totally different mindset of people who are not protecting the

school. I now kind of protect the school, I never used to at all, but I'm now very protective of the school. And handing it over to somebody who has no need to protect the school, just made me really nervous.

We are still looking to have two or three more tours each open day in term time. So I've still got to try to protect both sides, Stowe House Preservation Trust (SHPT) and the school. But I was very pleased when we decided it was too hard for the National Trust (NT) to take on, that's not to say it won't happen in the future.

Funders like to see joint partnership working...So if the NT took on this side of house opening, I think there would be a lot of funders who would be much happier, rather than just some one off Stowe House Preservation Trust (SHPT) quirky organization doing stuff like this(Interviewee 3, personal communication, April 7, 2011).

The English National Trust (ENT) could not continue to operate the same amount of tours as the SHPT if they took over house opening.

Participant #1 If the house was going to be run by the National Trust, they were going to cut down the tours or cut down the length of the tours (Interviewee 1, personal communication, April 11, 2011).

New Inn. The ENT's current project of converting a small coaching inn into a visitor center for the gardens will bring significant change to the Stowe estate. It will alter the way visitors approach and interact with the site. There are many details for both ENT and SHPT to consider as they prepare for this change. The opening of New Inn is an opportunity to focus on Stowe as a whole, referred to by participants as "One Stowe." Focusing on "One Stowe" will potentially change the way people view Stowe, particularly those already working for SHPT, ENT and Stowe School.

Participant # 9 When New Inn opens, the restoration of an eighteenth century coaching

New Inn, the English National Trust's (ENT) new visitor center will change the way visitors approach the gardens and the house. While this is the ENT's project, it will have implications on the house that the Stowe House Preservation Trust (SHPT) has to plan for as well.

inn, people will enter the gardens as they originally should have done by the Bell Gate. It is about bringing back to life the history that was originally the visitor experience, and certainly part of that is the One Stowe experience. I know that the interpretation is being developed differently in the house and in the gardens, but regardless of how they are doing it, in terms of what the message will convey to visitors is certainly a one-Stowe-experience. It is not Stowe Landscape Gardens; it is not Stowe House; it is just Stowe that they come to. And so in terms of the educational programs that we have been offering and the learning offer, everything has developed with the one Stowe experience in mind. When schools say that they would like to visit the house as well as the Gardens, we let them know of the additional cost, but for all intents and purposes there is no differentiation between a visit to the house or gardens. We use this as an opportunity to promote both charities. In terms of experience, they are coming to visit Stowe. I know that logistically there will be plenty of items that will need to be organized.

Participant #3 I've always known about New Inn, so my aim has really been to tighten up things, instead of suddenly panicking and going "Oh my god, how's this going to work?" However we're still at that point. I think because they haven't thought properly about New Inn. That's not detrimental, it's just there's a lot to think about and you won't know until it's actually built and they're in. There's a lot that you can't do until it's done. So ironically me, who's got nothing to do with New Inn, has always been working toward New Inn, because I think it'll just be fantastic. However I think as I get closer and closer I think I get more and more nervous about how it's going to pan out, but that's our next challenge.

Connection between the New Inn interpretation center and the new Stowe House Preservation Trust (SHPT) interpretation center

New Inn and our interpretation was going to be seamlessly linked together, so they would have that up here and you'd get to understand that bit and then you'd come through the gardens and then your story would be finished off in here [at the house]. So that was the original plan and that's what I've always worked toward (Interviewee 3, personal communication, April 7, 2011).

Participant #1 But then again going forward with the National Trust moving to New Inn, there's little I can do until they've made that move and then we can readdress what the signage issues are. I found out from the questionnaires, that people really do see Stowe as one, it is Stowe, not Stowe Landscape Gardens and Stowe House. They see it as one, and as they were writing the questionnaires, they really were giving feedback about both places. There didn't seem to be much distinction between the two, so I was quite pleased to learn that, because I think as a visitor you do want to think of it all as one, and I think you do naturally, because the house and gardens have always been together. So that's something that should be promoted as we go forwards, is the idea of the two together and hopefully that will be once New Inn's on line, and the house is opening in 2012 with new interpretation centre. Hopefully it will be a natural flow around the gardens to the house and people find it's more one Stowe, rather than two separate things.

The opening of New Inn should be utilized as way of promoting Stowe house and gardens, as One Stowe.

House and garden admissions go to separate organizations, how will that continue to work with New Inn? What if someone wants to visit the house only?

That's an issue that I have mentioned a few times to the National Trust (NT) and to the Stowe House Preservation Trust (SHPT) that we need to look at. I'm not completely sure how they're going to work it to be completely honest. Essentially I think what they'll be, you'll buy a garden ticket or you buy a house and garden ticket, so you can't visit the house on its own. Which I think will

be quite difficult in terms of Old Stoics, and people who have a vague relation to Stowe as a school and want to come and visit it. I think what we'll find is that we actually miss out on them paying to come in because they'll come in through other means, they'll come in through the school in some way. So I do think that's something that needs to be looked at.

There will be no way of getting to the house, unless the visitor first goes through the New Inn entrance and the gardens. This is a rather far distance to walk.

When we look at the view [from the house], we say it's two miles to the Corinthian arch and [New Inn's] not that far from the Corinthian Arch and that's in a straight line. It's quite far, particularly when you're coming, I think they're going to come from New Inn past the Lakeside Pavilions, and then essentially through the left-hand side of the Gardens, round through the house. I'm not completely sure how long that would take.

For a disabled visitor this would be almost impossible and would require a golf buggy to transport them through the gardens or allow access closer to the house on the North Front.

Anybody disabled is not going to come the whole way through the Gardens from New Inn to come into the house; it's going to be too far to travel even on a golf buggy. You know the buggy's going to have to wait while they come in and how's that going to work? So I think there will always need to be some kind of access to the North Front, particularly with coach groups. You're going to need them to be dropped off at the house, potentially to do the house either first or last, so there will always be coaches that come to the front to either drop off or pick up visitors. So I think access through the North Front will be something that will be worked out over the time when we start to operate from the South (Interviewee 1, personal communication, April 11, 2011).

Collaboration between Stowe House Preservation Trust and English National

Trust. The Stowe Aspirations and Inspirations program has been a very successful program that the Stowe House Preservation Trust (SHPT) and English National Trust (ENT)

have collaborated on. This project reached out to the community of Milton Keynes and helped make a difference in school children's perspective of the world. Underachieving students are brought to Stowe School for a field trip where classroom curriculum is integrated into a tour of the house. The grandeur of Stowe is the background for this lesson, teaching students that they too can aspire to great things.

Mechanisms put in place to help build and manage the relationship between Stowe House Preservation Trust (SHPT) and the English National Trust (ENT):
Strategic Plan
Partner's Working Group
Partners' Policy Forum

Stowe Aspirations and Inspirations is a jointly developed program between SHPT and the ENT.

Participant # 4 We have got a strategic plan (see Appendix G) for SHPT and I suppose to encapsulate it, our aim is to build on that relationship with the National Trust, to make sure that we don't trip over each other in bringing visitors to the site, to present the site as one location, whether you come to the landscape gardens or to Stowe House, the two are indivisible.

Some of the mechanisms we've put in place for that; we have a Partner's Working Group, so the National Trust property manager and I meet formally once a month and informally between times. And we have the Partners' Policy Forum that meets three times a year which provides the overall policy direction and guidance.

Participant #9 We have had a quite a few successful projects here, but certainly one of the most successful is the Stowe Aspirations and Inspirations project. This was developed as a joint SHPT and National Trust project.

This project targeted a partnership of 14 schools in Milton Keynes, identified as requiring support, because they are in areas of social deprivation. So their indexes of social deprivation are quite high with populations that are not very mobile, in that they are quite poor and impoverished backgrounds, so they actually stay put in an area for several generations with minimal experience and aspirations of the wider world. And therefore if their families and

their peers and their role models are not particularly well educated, experienced or travelled, then the young people with neither have these aspirations.

Of these 14 schools, last year we worked with six of them. We have since repeated this successful programme that contains a series of visits and we have involved three more schools which have sent a handful of children, underachieving children in target areas. We did a series of visits focused on their speaking and listening skills, developing their confidence and aspirations in life. This was really successful.

This year's mark of success was that despite the fact that the local council is withdrawing funding to the project, the schools have expressed an interest in participating again, so we will repeat this programme again. We are likely to involve another three schools from the same partnership, so that by the end of this year we will have reached nine of the 14 schools. This opens the 'gate' to having a direct discussion and communication with them. So in future we hope to build on this partnership, eventually reaching to all 14 schools and more.

I forgot to mention, Stowe School was also involved with their gifted and talented pupils, who came along and sat at the table and mentored the children and showed them around the house. It was quite nice (Interviewee 9, personal communication, March 24, 2011).

Conflicts between Stowe House Preservation Trust and English National Trust.

As the Stowe House Preservation Trust (SHPT) and English National Trust (ENT) are both heritage organizations they find it easier to collaborate but can also view each other as competition. The ENT has a slight monopoly on visitors; in order to reach the house visitors

must go through the gardens, meaning they must pay both ENT admission and SHPT admission. Currently there is no option of only visiting the house and not the gardens. In the past, the ENT's visitor lodge staff has neglected to inform visitors that the house was also open to visitors, which detracts visitors from coming to the house.

Because visitors to the house must first enter through the English National Trust (ENT) visitor center, collaboration between ENT visitor assistants and the Stowe House Preservation Trust (SHPT) is essential to informing visitors of the house's opening schedule. If SHPT and the ENT were one organization, the visitor assistants would probably be better trained to inform visitors of the house opening times, but because it is a separate organization SHPT information gets forgotten.

Marketing and advertising is a problem for SHPT. It seems to the SHPT staff that everyone knows the house is open, but actually as this example shows, they do not.

Participant # 1 So the other things that were raised were things about the visitor lodge staff [run by the ENT] not telling people that the house was open, so people said it was a surprise to them, "Why aren't we told this in the lodge?" So that was something we raised with my counterpart in the National Trust, and they tried as hard as they can to try and get the visitor assistants in the lodge to let people know, but of course they've got a huge amount of information to get across, they have to give out maps, and take admission, they're trying to sell National Trust memberships and trying to get their Health and Safety information across. It's just one extra thing and it tends to be thing that's dropped off at the end. So I kind of hope that's improved, but I'm not completely sure.

Actually just at the weekend, we had somebody come up and say we had no idea the house was open until we walked past the sign on the South Front. And you think how could you have got this far and not know? There's signage on the way in and then the National Trust (NT) is supposed to tell you and then there's signage in the gardens, so you'd hope that they would know, but then people don't tend to read signs, they tend to just want to go to the tearooms, to the toilets and then into the gardens and then they miss all that information that's right there. This is one of the reasons that I put a sign at Grenville column, because it's kind of after the decompression of coming through all that sort of information. And then you're actually enjoying your time in the gardens, and that's

when you see the sign and hopefully at it's at the right time of day and you come up to the house. So those were some of the things that were raised (Interviewee 1, personal communication, April 11, 2011).

Collaboration between Stowe School and English National Trust. Stowe School and the English National Trust (ENT) have collaborated on a variety of programs including Service at Stowe projects. A participant recounted the most recent project, a cadet project day to test the new orienteering trail involving Buckingham Air Training Cadets, and Stowe School pupils. The participant also noted that Stowe School desires to participate in more community projects such as this, but that they lack the community contacts. Collaborations between Stowe School and the ENT should focus on utilizing the ENT's community connections and Stowe School's physical space and other resources.

Participant #9 I also facilitate partnership with various elements and departments both at Stowe School and Stowe House Preservation Trust (SHPT). I will liaise with SHPT and the Coordinator of Services at Stowe for Stowe School. We have done a number of projects over the course of the last two years.

Can you give an example of a Service at Stowe project that you've done with the school?

Yes, the most recent was last Saturday 19th of March. We ran a cadet project day, which involved Buckingham Air Training Cadets, and Stowe School Duke of Edinburgh Award (DoE) pupils. The project [involved various teachers from Stowe and the Stowe Director of Operations] who helped to lead the event and welcome the group. We worked in partnership in the development of an orienteering trail. We now have an orienteering trail, which was tested by this youth project group.

Stowe School hosted the morning. The young people from both the school and the

Buckingham Air Cadets went on an orienteering trail. Stowe School hosted the morning tea reception and lunch. In the afternoon, I hosted a conservation task which was to make bat and bird boxes, which is a part of the mitigation for the new Stowe project to ensure no net loss in biodiversity in the creation of the new visitor facilities center. So they helped to make an impact on that. This is an example of a more recent collaboration. Quite a successful project really!

Stowe School has the desire to engage a wide range of the local community, but they are still developing their community contacts and network. So I will be feeding into that process by tapping into networks that National Trust has already established. This is a good example of where the partnership and the project are driven by a need (i.e. local community) and that a partnership approach is mutually beneficial (Interviewee 9, personal communication, March 24, 2011).

Conflicts between Stowe School and English National Trust. Conflicts between Stowe School and the English National Trust (ENT) have occurred mostly because of Stowe School's past inappropriate use of the historic garden land and their current need for more land to expand school facilities. The provisions of the lease have helped guide this partnership, but the partnership has also relied very heavily on positive inter-personal skills, which have not always been present. The lease framework is there to fall back on when a mutually beneficial decision cannot be made.

Arrangements put in place rely on interpersonal skills. The partnership can be negatively affected by the personality conflicts of a few.

Participant #4 Now the interesting thing is that a lot of these partnership deals and arrangements rely very heavily on interpersonal skills and how people get on together and that's why this lease framework is quite important. We reached a point a few years ago where the lease was being used to

drive everything and there seemed to be no flexibility. And sadly my predecessor, [whose position was split into two positions] became a casualty in all this.

The relationship between [my predecessor], the National Trust (NT) and sadly our principal benefactor, who chairs the Partners' Policy Forum, had broken down. And it broke down to the extent that the Chairman of the Partners' Policy Forum said "I'm going to take on responsibility of the Partners' Working group as well." And the two were subsumed together. Not entirely my predecessor's fault, I think there was fault on both sides, NT and Stowe School. But the arrival of a new NT property manager, at almost the same time as I arrived, gave us the chance to rethink and to try and put the relationship back on a level footing. And we've done that by having the leases there to fall back on when we need them, but by being flexible, pragmatic and trying to solve problems day by day and not to see the problem, but to see the solution. And that's working well.

New personnel at both the English National Trust (ENT) and Stowe School provided an opportunity to start over in a sense and build a better relationship.

The recent relationship has not been driven by the leases, but rather by the mutual respect and desire to get along and help each other. It is important both partners see the solution rather than the problem.

Asset exchanges between Stowe School and the English National Trust (ENT) explained. When looking at this arrangement, it becomes clear that if the personnel of each entity did not personally get along, they would not be as motivated to make mutually benefitting decisions such as the golf course and home farm asset exchange.

Because it's a complex site and we haven't finished with the way the assets are divided between the NT and Stowe School, it does need that personal touch.

Over the years, Stowe School had done its very best to maintain the estate, but what we'd done included putting a golf course on the Western Garden, on the historic parts of the parkland. And one of the principal drivers of the whole restoration program was to return that piece of garden to parkland so take the golf course off it, and get it back to its original look and feel from the eighteenth century. To do that, Stowe School purchased some land on the North of the estate to rebuild the golf course up there, and in about 2013/2014, we will give the [current] golf course [land] back to the NT. They will

return it to its original condition, by which time we will have built a new golf course on the far side of the estate. In return for that, the National Trust will give us Home Farm when they've vacated Home Farm to go to the New Inn for their new visitor centre (Interviewee 4, personal communication, April 7, 2011).

Potential of Stowe

Almost every participant had ideas about how Stowe could operate better. They all had a deep appreciation for the estate and gratitude for being able to work in such a beautiful place. This reinforces the fact that everyone does want Stowe to be the best it can be, they just have different ideas of how to achieve that. This section presents some of the participants' ideas on how Stowe could be improved and the partnership strengthened. Ideas generated included: forming partnerships with local universities for training opportunities at Stowe, better retail offerings, offering more entertainment programs such as reenactments, the creation of an annual event, art exhibitions, renting the facility out for day conferences, holding architectural/art history courses and offering catering facilities in Stowe House for visitors.

Participant #1 I think everything needs looking at, at a higher level. I really think Stowe could be amazing, at the moment it's quite low level, the house opening and things, realistically because the size of the place, Stowe could be so much better. It is a case of getting those people in place to be able to handle that. It's all well and good doing masses of marketing, but if you can't handle the number of people going to come through the door, there's no point, and at the moment I've not got enough volunteers to cope with more than the visitors we've got currently, which is our 5,000 a year. So it's kind of that thing of chicken and the egg,

where do I start? I need to recruit volunteers to be able to handle more people coming around, but until we've got more visitors, there appears to be no call for more volunteers.

Everything at Stowe could be run bigger. I think there are some places [other houses] where you couldn't do more, where I think at Stowe there's a huge amount that we could do in the future. And like I said it's just getting those key people in place to be able to handle more people. Until I've got sufficient volunteers to actually operate within the house, I don't want to increase marketing because currently I haven't got the people in place (Interviewee 1, personal communication, April 11, 2011).

Possibility for forming partnerships with university for training opportunities at Stowe.

Participant #4 What I'd really like to do is to use the house for bringing in heritage students. Buckingham University will start their heritage course in January [2012], a Bachelor of Art History and Heritage Management. We want to form a partnership with them so that we become the place to which they bring people for practical experience. Leicester University has a similar arrangement with a place called Lamport up in Northamptonshire, again I don't know of any other courses that do that. So Buckingham's the obvious one for us to use. But I've got strong links with Ironbridge, we've had several Ironbridge students come and do assignments. We've got the link through yourselves with West Virginia and, as you know, we had the Stowe Fellow from Yale last year, and I think these are all links that we should be cultivating as we go forward beyond the restoration.

Participant identifies their audience as being on two levels-the academic and the public-and how to meet their needs.

I suppose we've got two levels, we've got a university in town, we should bring them to learn about the conservation and restoration of the house, we should bring the public in for art history lectures, art appreciation

classes, architectural history and we should also bring the public in, if we can, for some of our events on conservation and estate management.

Retail offerings needs improvement, there is the possibility of a link with the School Shop.

But how do we attract people in? I think we have to start looking at our retail offer. I don't think we're very imaginative either in our retail offer when you come to a place like this; recently we went to Deene Park up in Northampton, where all their souvenirs were very reasonably priced. The guide book was £2 and packed full of information. They were selling pencils with Deene Park on it, at 25 pence. They had mugs for £2.75. I think we should do this sort of thing because people want to take something away. So it's a link we should probably exploit between the School Shop, that buys these things in any way for pupils to buy and the Stowe House Preservation Trust (SHPT) retail outlet, which is pretty shabby. There's a metal framed glass front cabinet with a till on it, that looks pretty tacky and a few books scattered around. There's no encouragement to buy. We need a proper retail space.

There should be a shift to start thinking of Stowe as entering the entertainment business.

You have to start thinking we are entering the entertainment business now. Now that's even more difficult for us, than it is for, let's say Burghley House. Burghley you can do a certain amount of entertainment, Stowe probably could, but Stowe doesn't have that immediate factor when you come in of seeing just how a family lived. You've got to use your imagination in it. So I think we have two options: we either say, come in and see these fantastic, impressive, beautifully restored interiors and get an idea of the sheer volume and space that was in an eighteenth century house (and let's be honest this place was a palace rather than a house), or we say we'll do lots of events in here that draw the public in. One option that we looked at was with a company called Heritage Arts, who lay on events for storytelling, re-creation of

the atmosphere, food tasting and that sort of thing. There must be a way to bring people in. We can only do that for a period of the year, and it's a very short period - when there are no pupils. When the pupils are here it has to be guided tour. But that's the sort of dilemma that we're now facing and I think that's probably as exciting as doing the restoration work.

Eighteenth century reenactments could be a way to attract a lot of visitors to Stowe one day or weekend a year.

I think reenactments have to be the way to go, and probably in conjunction with the National Trust. Now my personal view is that we've not been anywhere near imaginative enough in doing this. We have one eighteenth century day in September in the gardens, and I think the one thing we offer is dancing for children in the Marble Saloon. We really ought to be saying eighteenth century food, eighteenth century music, eighteenth century entertaining, the servants, the upstairs, and downstairs. We have had contact with a company called Heritage Arts, who are looking to do a series of tableaux in the rooms as part of a grand opening. And I can see that becoming every year a Stowe theatrical spectacular. Just do it once a year, charge a bit more to bring people in and if necessary one could do the sort of things that appeal to children, you could do face painting, or do a masked ball, although the masque was more seventeenth century, but it was still going on in the eighteenth. I think we have to think really carefully about that for 2012, for a grand opening, when the restoration is completed. And we'll have the Music Room, the Egyptian Hall, hopefully done by then.

It is possible the reenactments could be a part of an annual event.

The school itself and the history of the school might be an attraction for some to visit and a way to attract new visitors.

If you then say, well the School itself has got some interesting buildings, it will have the farm, it's got a chapel, it's got an art school, it's got the recreation facility, StoweBucks; we've got all those things and perhaps there's bit of a story to tell there for people to see how the school has made use of the

spaces. If we were a family owning this house we would carry on acquiring works of art, rare books, but rare books are difficult to show to people, but certainly works of art.

Organizing students' artwork as well as the artwork Stowe already owns into exhibitions as a new way of attracting visitors.

What we've also got is a whole bunch of resident artists, who actually achieve a very high standard and I think one of the things that we could do is make more of the student art around the house and the collection of sculptures that we've got by David Wynne. David Wynne is one of our more famous contemporary sculptors, he's still living, we have the collection of all his maquets, his models for his sculptures and some of the original sculptures themselves. Personally, I am not a huge fan of putting them in State Rooms, but I think if they were around the house as some sort of trail or some form of exhibition in the way that Chatsworth has a Moore exhibition, that could work well. Chatsworth of course has Epsteins. We've got Lynn Chadwick too, who was a very edgy, aggressive sculptor in the 1960's, and we've got a couple of his works. So I think we should be saying that Stowe is still a center of collecting and art and developing.

Expanding the events operation to include day conferences, and architectural/art history courses.

I think we ought also to open it up for day conferences; we ought to be offering people the chance to come here to run a conference on site. Or run an architectural history, art history course. We've had some very successful sketching days, where people come to learn to draw and sketch and use the house as the subject. And they either sketch details like the Corinthian capitals or they'll try and get the impression of the whole of the South Front. So we have seen some good stuff done there. And temporary exhibitions as well, we can bring exhibitions in, particularly through people with connections to the school, although there's always a risk there that you bring something in that costs you money and it doesn't make a profit.

Offering catering facilities for visitors at Stowe in the future.

Participant # 1 Yes, absolutely, and I think that's something that we need to look at, and I'm sure is being looked at as part of the interpretation, is that there needs to be some kind of catering facility at this end (Interviewee 1, personal communication, April 11, 2011).

Participant #4 I'd like to be able to find refreshments in the house, that's another one. Because the English like a cup a tea and piece of cake, and what better place to have it than the State Dining Room, so I would and I will talk to the National Trust about how we do that. We've got an unwritten agreement, that we won't undercut their catering in the grounds. However, when they move to New Inn, they'll be so far away from the house, that even with a little mobile wagon, it will take too long, and I think there will be a way to do that, and we'll find a way.

Would you do anything differently?

Would I do anything else? I wouldn't change the school. I'd plan things slightly different in terms of the detail work we're doing. I'm just trying to get a plan to put the visitor entrance the other side of the cellar from where it's planned to be. I'd try and do that, but that's a detail. So no, I don't think I would, I think we're going about this the best way we can.

Participant is looking forward to seeing the final product of the Learning History Methodology (LHM). The participant acknowledges they do not spend time understanding the dynamics or being reflective about why they do the things they do.

I think your approach, the history story, and living history, if there are things that occur to develop on your research and [other student's] research, then we would be really interested, because I don't think we really understand the dynamics around here. That's something perhaps I would change and I will change is to publicize ourselves much, much better in Milton Keynes and Buckingham. There are still people in Buckingham who don't realize that Stowe House is open to the public. So I think I'd like to see more people coming up the hill and around the site. I

suppose, really, really big things, if I could change them I would, because I'd let people have free entrance to the house (Interviewee 4, personal communication, April 7, 2011).

As the final interviewee recounted, this Learning History is an opportunity for Stowe to reflect on how they are operating so that they can make changes in the future. The participant acknowledged that in the past, they have not taken the time to understand the dynamics of the threefold partnership at Stowe. Most participants seemed to enjoy the opportunity to talk about what they are doing at Stowe and appreciated the opportunity to reflect. This Learning History document will help those at Stowe reflect on their own perspectives, as well as those of their colleagues in order to create positive change at Stowe.

CHAPTER V

Synthesis of Findings, Discussion and Future Research

Purpose of the Study

The purpose of this study is to examine the restoration, adaptive use and historic site management of Stowe House, Buckingham, England using the narratives of individuals with controlling interest in the historic property. The Learning History Methodology (LHM), with its requisite interview process, was used as a means to record, validate and analyze various perspectives related to the preservation of the house. The completed narrative has the potential to inform future decisions made at Stowe and it may be useful to others undertaking similar restoration projects. The following research questions provided direction for the study:

1. What are the lessons learned from the experience of participants engaged in a site that has been both adaptively used for a modern purpose and restored as a house museum open to the public?
2. How might experiences and lessons learned by the research participants be analyzed and synthesized then used to inform subsequent projects both at Stowe and elsewhere?

Synthesis of Findings

Within the field of historic preservation, often a single strategy for preservation is chosen from preservation, restoration, adaptive use or reconstruction. Occasionally it is appropriate to simultaneously implement two or more of those strategies. Adopting multiple strategies requires the involvement of different organizations whose goals and philosophies may clash. Stowe House is an example where preservation strategies restoration and adaptive use were applied in tandem, forming the partnership of Stowe School, Stowe House

Preservation Trust and the English National Trust. In this case forming a symbiotic tripartite partnership has resulted in the long-term survival of the Stowe estate. The findings of this study were analyzed and synthesized to address the opportunities and challenges of adopting multiple strategies for preservation simultaneously and are reported for each research questions identified for this study. Based upon the findings of this study, the following synthesis was developed to address how a site can adopt multiple strategies for preservation at a time and are reported for each research question identified for this study.

Research Question #1: What are the lessons learned from the experience of participants engaged in a site that has been both adaptively used for a modern purpose and restored as a house museum open to the public?

Successes. The interview data revealed that Stowe House Preservation Trust (SHPT) has been successful in the areas of forming a qualified restoration team, developing a restoration philosophy and fundraising. There are also examples of successful collaborations between SHPT, English National Trust (ENT) and Stowe School such as the Visual Education program, the Stowe Aspirations and Inspirations program and Service at Stowe programs.

Formation of a Qualified Restoration Team. SHPT has been fortunate to have the majority of the same team members in place since Phase 1. Having an open, functioning relationship between the construction team, architectural firm, conservation firm, project manager firm and the client has helped Stowe lessen the complications of an already complicated project.

Restoration Philosophy. Early on in the restoration process, SHPT defined a restoration philosophy that has guided the project; to leave as much of the original material

as possible and to accept cracks or damage so long as they are not structural. Having this philosophy in place has allowed Stowe House Preservation Trust (SHPT) to be consistent in the restoration repairs and maintain the historic integrity of the building fabric. The philosophy has been adopted and applied by the team of professionals working on the restoration.

Fundraising. While at times it has been difficult to manage relationships with funders, SHPT has been extremely successful in raising funds for the restoration. SHPT has received funding for the restoration of Stowe from a variety of sources including: Heritage Lottery Fund (HLF) grants, Robert Wilson Challenge Fund through the World Monuments Fund Britain (WMFB), English Heritage, the Getty Grant Programme, the Paul Mellon Estate, the Country Houses Foundation and other private donors. Without the generous support of these donors, the restoration would not be possible.

Collaboration between the partners. Partners at the Stowe estate have found ways of collaborating with one another. The Visual Education program, a course taught by SHPT staff to first year pupils, is an excellent example of collaboration between the SHPT and Stowe School. The course is designed to instill in the pupils a sense of appreciation for the historical significance of the house and gardens. The Stowe Aspirations and Inspirations program has been a very successful program that the SHPT and English National Trust (ENT) have collaborated on. This project reached out to the community of Milton Keynes and helped make a difference in the school children's perspective of the world. Stowe School and the ENT have collaborated on a variety of programs including Service at Stowe projects. Future collaborations between Stowe School and the ENT should focus on utilizing the ENT's community connections and Stowe School's physical space and other resources.

These projects have been successful because they utilized the resources and strengths of each organization and were of mutual benefit to each organization and the local community.

Improvement areas. Because of the Stowe House Preservation Trust's (SHPT) responsibility as steward of Stowe House and as manager of the restoration most of the improvement areas related to them directly. The areas in need of improvement include: research, project managing, governance issues, staffing, marketing and professionalism. The data also revealed insights into how each individual relationship could be strengthened.

Research. To date, the historical research is conducted as the restoration progresses. This practice has implications for alterations that have already been completed and for funds that have already been raised. To strengthen the restoration project and help it progress more smoothly research should be conducted early on in the process.

Project Manager. A project manager was not employed during Phase 3 of the restoration at Stowe resulting in breaches in communication and insufficient planning. Many of the participants noted that having a project manager during other phases made all the difference in how the relationship between SHPT and Stowe School was managed during the restoration. When a project manager was involved during Phase 1 and 2 there were fewer conflicts between SHPT and Stowe School, and SHPT staff was able to focus more attention on research and the restoration. Employing a project manager in future phases could help to manage the relationship between SHPT and Stowe School.

Governance Structure. Participants revealed that the governance structures at Stowe have at times held them back from progress as members of the boards and committees were not able to devote enough attention to Stowe. The committees and governance structures put in place to help guide and support the relationships between SHPT, English National Trust

(ENT) and Stowe School are important. However, they should be reconsidered and evaluated for effectiveness. Choosing board members who are committed to being closely involved with Stowe House Preservation Trust (SHPT) may be more beneficial than the current board/committee structure in which those who have achieved prominence within their field are invited to participate.

Staffing. As Stowe looks to the future it is important to address staffing issues. Goals put in place to increase tourism and provide more programming will not be attainable without more staff. The recently recruited volunteers will help out greatly with visitor services, but there are other positions that should be filled by qualified and dedicated individuals. SHPT needs a qualified marketing person, a learning officer and a group bookings administrator. A marketing person to help increase public awareness about Stowe, a learning officer to engage the local public with activities at Stowe and a group bookings administrator to jointly manage SHPT and English National Trust (ENT) group bookings in order to streamline the process.

Marketing. A major problem identified by research participants is the lack of public awareness about the days and times the house is open, because Stowe does not have an active marketing strategy. Having personnel devoted to marketing would help demystify the public perception of Stowe as only a school for the wealthy. New marketing personnel could inform the public that Stowe is open to them, too. In order to receive more visitors they must have consistent opening time and effective marketing. Effective marketing would increase the public's awareness of opportunities to visit Stowe.

Visitor Services. Many participants felt that the level of professionalism of the visitor services at Stowe House should be increased. Currently there is no permanent space for the till or retail offerings. The interpretation signage includes temporary laminated signs and

there is not a large volunteer or staff presence. The data revealed that Stowe House Preservation Trust (SHPT) has made progress in this area; the till and retail offering situation has improved from a cash box and a basket to a larger display case and volunteer numbers have increased. SHPT has also taken the initiative to administer visitor questionnaires to collect feedback. Many research participants felt that the new interpretation center will provide a better experience for visitors and solve some of the current problems because it will provide a permanent space for the till and retail offerings.

Insights to Strengthen Relationships. As previously mentioned, there are many opportunities for conflict between SHPT and Stowe School. The biggest conflict is over physical space, with the school's needs usually taking precedence. A participant reported that they would like to see an attitude adjustment by the school toward SHPT. The participant pointed out that the school would not be enjoying beautifully restored facilities if it was not for SHPT. It is important to remember that the acceptance of public funds require public access in return.

Because both SHPT and the English National Trust (ENT) are heritage organizations they find collaboration easier, but can also view each other as competitors. The ENT has a slight monopoly on visitors; in order to reach Stowe House visitors must go through the gardens, meaning they must pay both ENT admission and SHPT admission. Currently there is not option for only visiting the house and not the gardens. In the past the ENT's visitor lodge staff have neglected to inform visitors that the house was also open to visitors, which detracted from efforts to get visitors to come to the house.

Conflicts between Stowe School and the ENT have occurred mostly because of Stowe School's inappropriate use of the historic garden land in the past and their current need for

more land to expand school facilities. The lease framework has helped guide this partnership, but the partnership relies very heavily on positive inter-personal skills, which have not always been present. The lease framework is there to fall back on when a mutually beneficial decision cannot be made.

Perhaps the most insightful revelations were about how the restoration has affected the pupils' living conditions and social behaviors. Most of the inconveniences produced by the restoration are unavoidable; however, the interview data reveals that how the inconveniences are perceived is based on who is involved. When those directly affected by the noise and construction mess feel that they have some control over the situation, or have been considered in the decision making process, they are much more agreeable.

Research Question #2: How might experiences and lessons learned by the research participants be analyzed and synthesized to then inform subsequent projects both at Stowe and elsewhere?

The following guiding principles were developed based on the experiences and lessons learned by the research participants about the restoration process at Stowe House:

1. Formation of a complete, qualified restoration team will lessen the complications of a complicated project.
2. Agreeing upon a restoration philosophy early on in the project this will guide the restoration.
3. Collaborations should utilize the resources and strengths of each entity.
4. Research should be conducted early on in the process and allow for discoveries as the work progresses.
5. When possible a project manager should be employed.
6. Board members should be selected carefully, based on who has the time to dedicate to the project.
7. Be inclusive in the decision making process allowing those affected to be heard. This will make for a better experience for all.

Discussion

Stowe House is a country house that has survived despite the pressures placed on country houses at the turn of the twentieth century. The adaptive use of the building in 1923 was the first step toward the restoration of Stowe House. Without Stowe School stepping into the situation Stowe House would most likely have been demolished. Over time English National Trust (ENT) and Stowe House Preservation Trust (SHPT) have become involved in fundraising and restoration work that Stowe School could not have accomplished on its own.

The operation of Stowe School within the Stowe estate gives Stowe House a purpose and ultimately preserves the house. SHPT alone would not be able to maintain Stowe House or attract enough visitors to remain a sustainable organization. Without SHPT, the school would not be able to afford the restoration that allows them to live and work within such beautiful surroundings. All three partners must continue to develop a mutually beneficial symbiotic relationship. Even if they do not recognize it, each organization is already benefitting from the others and surviving as a result.

Managing the relationship between SHPT, ENT and Stowe School is the most important key to the success of Stowe. The Learning History Methodology (LHM) allowed participants to anonymously voice their concerns, fears and future hopes of Stowe without fear of reproach. Reflecting on the process is immensely important at Stowe because there are so many different perspectives represented. The threefold partnership can be strengthened by each partner obtaining a better understanding of the others' points of view. It is hoped that this Learning History will allow those in decision making roles at Stowe to consider all these perspectives and look objectively at the restoration process. The information gathered can be

used to guide Stowe to make more efficient decisions in the future, leading to a stronger, more efficient relationship that truly represents the ides of “One Stowe.”

The interviews revealed many insights into relationships that would have otherwise gone unnoted. Gaining a better understanding of what Stowe House Preservation Trust (SHPT) does and why they are required to do what they do, will hopefully, change the attitude some associated with Stowe School have toward SHPT. Another benefit of the study might be a better understanding of how the restoration affects the pupils and resident staff that will help those involved look for ways to mitigate the inconveniences placed upon them. The presence of Stowe School within the structure makes restoration that much more complicated. Real people’s residences are being affected by the work, and that must be taken into account as the restoration continues. For example, if during the winter months pupils are feeling a bit claustrophobic without the option of spending time outside, perhaps that is not the time to close off rooms to them.

Many English country houses are in the same situation as the Stowe estate. Having been adaptively used at the turn of the century they have avoided destruction, but have not been given the proper maintenance over the last century. Most of the organizations are not eligible to apply for grants to cover restoration costs because they are not a conservation non-profit organization. Involving a second or third conservation organization into the operation of country houses is becoming more and more essential to the restoration of country houses. Stowe is an example of how country houses with two or more partner organizations can manage their relationships. Stowe is both a warning and a guide to such historic sites. There are areas that Stowe should continue to improve upon, but overall, Stowe is a success story; the historic building is still standing and is being used in a meaningful way.

Future Research

Learning History Methodology (LHM) as applied to design research is relatively new. Further research should be done utilizing LHM as a means of documenting and analyzing restoration and adaptive use projects. Subsequent LHM projects would give the field of historic preservation a larger body of knowledge and the opportunity to learn from a variety of preservation projects. This in turn could lead to clear, established guidelines for restoration projects and partnership models.

Because the English country house movement preceded the American country house movement of 1890-1930 (Aslet, 2005) England faced the crisis of what to do with their aging houses and how to preserve them before America did. Currently in America there is a crisis over what to do with so many failing house museums. American preservationists should take note of how England has handled the situation and learn from them. Specifically, the example of Stowe shows how a house museums can be occupied by a modern use, but can also open to the public for tours and educational programs. There are subtle differences between the American and British preservation systems worth considering and further research should be conducted on how the partnership model at Stowe could be applied to American house museums.

As I lived and researched at Stowe House, I was fascinated with how the pupils viewed living in such a remarkable facility. To me, it seems extraordinary to live and attend school in an eighteenth century ducal palace. I feel so privileged to have had the chance to visit such a place. Do the pupils also view their opportunity to live at Stowe with such appreciation and rarity or is it just normal and expected to them? I also wondered how students could go from living at Stowe to living in a small apartment, or working within a

cramped office cubicle. Further research involving Stowe pupils and alumni could be conducted to inquire about their perceptions of Stowe and to ask how living at Stowe affects where they presently live and work.

Conducting a second Learning History with Stowe after the completion of all restoration phases would be useful. It would allow the researcher to analyze the remainder of the restoration process to see if the organization had made changes based on the current Learning History document. It would also reveal if and how the organizations learned from the first Learning History.

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APPENDICES

APPENDIX A

Letter of Agreement to Identify Stowe



Davis College of Agriculture, Natural Resources and Design

February 21, 2012

To whom it may concern:

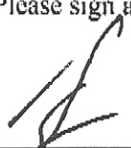
This is a letter of agreement to allow Stowe School and Stowe House Preservation Trust to be identified in a Learning History project to document the restoration and adaptive use of the Stowe Estate in Buckingham, United Kingdom. This research study is being conducted in pursuit of a Ph.D., by Anna Phoenix in the Division of Design and Merchandising at West Virginia University. She is working under the supervision of Dr. Kathryn Burton, an Assistant Professor in the Davis College of Agriculture, Natural Resources and Design.

The community of participants will remain anonymous in the dissertation. Individual participants' involvement in this project will be kept as confidential as legally possible. Each recorded interview will be quoted in the final dissertation; however each participant will not be listed by name but rather by researcher generated pseudonyms. Stowe School and Stowe House Preservation Trust along with the location and history of the estate will be included in the final dissertation. Before publishing any subsequent documents from this research, I will again ask for permission to identify Stowe, or will use a generic title such as "Country Estate".

West Virginia University's Institutional Review Board acknowledgement of this project is on file.

Thank you very much for your time. Should you have any questions about this letter or the research project, please feel free to contact Anna Phoenix at (304) 685-7846 or by email at Anna.Phoenix@mail.wvu.edu. You may also contact Dr. Kathryn Burton at (304) 293-0814 or by email at Kathryn.Burton@mail.wvu.edu.

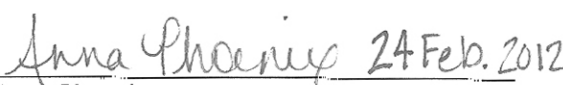
Please sign and date:



Nick Morris 24 Feb 12



Kathryn Burton



Anna Phoenix 24 Feb. 2012

Division of Design & Merchandising

Phone 304-293-3402 702 Allen Hall
Fax 304-293-2750 P.O. Box 6124
www.design.wvu.edu Morgantown, WV 26506

Equal Opportunity/Affirmative Action Institution

APPENDIX B

Interview Questions

Research and Goal Setting

What was your original goal?

How did you begin?

What research was involved?

How were you involved?

When did you become involved?

Why did you become involved?

What is your official role?

Community Consultation

How were you involved with community leaders and/or local business?

What leaders/businesses?

Why?

Financial Planning

What is a rough estimate of the cost of your work/project?

How was it or will it be funded?

Was any part of the work donated?

What portion/percent?

How were you able to receive those donations?

What government funding was received?

How was the remainder covered?

What process was completed in order to get the funding needed?

What type of fundraising was done?

Site Stabilization

Who previously owned the property?

How was the property obtained?

What had to be done in order to gain ownership of the property?

How was the business plan written or created?

What does the business plan consist of?

What steps were included in the plan?

How many phases were included in the plan?

When were or will the phases be complete/completed?

How long did it take to complete?

Planning and Feasibility Studies

What work had to be done in order to structurally stabilize the building?

What studies had to be completed in order to find out what needed to be done?

Who was employed to complete these studies?

Implementation

What is your role in the restoration process?

How was the order of job completion decided?

Are there any interesting stories you have about your involvement?

What unexpected events happened?

Did any part of involvement/project go as expected or according to plan?

Looking back, what would you do differently?

When was your involvement/task completed or expected to be completed?

How far off schedule are you?

Why do you believe that is?

What have you learned from this project?

Why do you feel strongly about this project?

Why do you feel historic preservation is important?

What advice do you have for people starting or currently partaking in a similar project?

Consultant Selection

Who was chosen to complete the jobs?

How were they chosen?

Who was chosen to be committee members?

How were they chosen?

Are any of the committee members volunteers?

Architectural Services

How will the building be maintained in the future?

Who will be responsible for the maintenance?

What type of work will need to be done in order to maintain the building?

Business Start Up

Who will be running the business aspect of the school?

Who will be running the business aspect of the visitor services?

What is the business plan for the future?

What types of events will be held in the facility?

Project Communications and Completion

When is the completion of the restoration tentatively scheduled?

Is anything scheduled to celebrate this accomplishment?

If not scheduled yet, what are your visions for the celebration of completion?

How will the Stowe House continue to operate, in terms of funding? (donations, government funding or self operating?)

APPENDIX C

Institutional Review Board Approval and Continuing Review Letter



Expedited-IRB Protocol-Approval

To: McFall, Barbara
From: WVU Office of Research Compliance
Date: Friday, March 18, 2011
Subject: Approval Letter
Tracking #: H-22857

Title: Historic Preservation and Adaptive Reuse of a Historic English Country Estate, A Learning History

The research study referenced above was reviewed by the West Virginia University Institutional Review Board (IRB) via expedited review procedures and was approved in accordance with 46 CFR.101 (b).

This protocol was reviewed using the following

Initial Protocol (Expedited/Full Board) Review Checklist

The following documents have been approved and validated for use in this study and are available in the BRAAN system:

Surveys, Questionnaires, Interview Attachments
IRB_Phoenix_interview_questions.do
Consent Form(s) Forms OMR ICF Miscellaneous Attachments
IRB_Phoenix_Consent Form.doc Consent Form IRB_Phoenix_Cover_Letter.doc
Cover Letter to be used for recruiting and as script for beginning of interview
IRB_Phoenix_interview_questions.doc Interview Questions
IRB_Phoenix_References.doc Reference Phoenix_Data Management Plan.doc Data Management Plan

This is an expedited category 7. The approval period is from March 18, 2011 through March 17, 2012.

Thank you.

Letter Sent By: Ast, Lilo, 3/18/2011 4:35 PM

A handwritten signature in cursive script, appearing to read "Yil Ast".

Once you begin your human subject research, the following regulations apply:

1. Unanticipated or serious adverse events/side effects encountered in this research study must be reported to the IRB within five (5) days.
2. Any modifications to the study protocol or informed consent form must be reviewed and approved by the IRB prior to implementation.
3. You may not use a modified informed consent form until it has been approved and validated by the IRB.



Expedited-Continuing Review-Approval

To: McFall, Barbara
From: WVU Office of Research Compliance
Date: Wednesday, February 29, 2012
Subject: Approval Letter
Tracking #: CR-1924 (H-22857)
Title: Historic Preservation and Adaptive Reuse of a Historic English Country Estate, A Learning History

This continuing review was reviewed using the following:
Continuing Review Checklist (210c)

The following documents have been reviewed and approved:

Surveys, Questionnaires, Interview Attachments
IRB_Phoenix_interview_questions.doc
Consent Form(s) Forms OMR ICF Miscellaneous Attachments
IRB_Phoenix_Consent Form.doc Consent Form
IRB_Phoenix_Cover_Letter.doc Cover Letter to be used for recruiting and as script
for beginning of interview
IRB_Phoenix_interview_questions.doc Interview Questions
IRB_Phoenix_References.doc Reference
Phoenix_Data Management Plan.doc Data Management Plan

This is an expedited category 7. The approval period is from February 29, 2012 through February 28, 2013.

Thank you.

Handwritten signature in cursive script, appearing to read "Yil Ast".

Board Designee: Ast, Lilo

Letter Sent By: Ast, Lilo, 2/29/2012 9:35 AM

Continue following the regulations below:

1. Unanticipated or serious adverse events/side effects encountered in this research study must be reported to the IRB within five (5) days.
2. Any modifications to the study protocol or informed consent form must be reviewed and approved by the IRB prior to implementation.
3. You may not use a modified informed consent form until it has been approved and validated by the IRB.

APPENDIX D

Data Management Plan

Data Management Plan: HISTORIC PRESERVATION AND ADAPTIVE REUSE OF A HISTORIC ENGLISH COUNTRY ESTATE, A LEARNING HISTORY

Types of Data to be Collected:

1. A timeline of relevant events concerning the formation and operation of the Stowe House Preservation Trust (SHPT) will be constructed using published and unpublished data from: (a.) meeting minutes, (b.) funding proposals, (c.) digital and print media, (d.) other archival documents.
2. Diverse stakeholders from the SHPT, Stowe School and National Trust will be interviewed regarding their perception, activities, and experience surrounding these events. Interview will be recorded and transcribed.
3. “Expert” commentary will be added in the margins to call attention to key insights and turning points.

Data and Metadata Standards

1. Data collected will accurately reflect the broad spectrum of experience and opinion expressed by those engaged in the project under review during the proscribed time period, 1997-to present. Criteria (time, initiatives, and people) for inclusion will be determined by the Principle Investigator and the researcher.
2. Timeline data will be gathered from public record documents and more private meeting minutes and/or grant application documents used with permission. Documents may exist in a variety of forms both traditional and digital. Selected data points will be extracted from original files as applicable.
3. Interview data will be collected using a portable digital recorder and downloaded/transcribed into password protected file formats for manipulation. Raw data will not be transferred to other locations or formats.

Policies for access and sharing and provisions for appropriate protection/privacy

1. Transcripts of interview data selected for inclusion will be assigned a researcher created pseudonym (i.e. “leader 1”) to assure anonymity, reviewed for accuracy/propriety, and validated by the interviewee before being shared with anyone beyond the interviewer.
2. Permissions will be acquired and on file for all other non-public print data/alternative media (i.e. meeting minutes of private meetings, etc).
3. Data will be shared in the form of a Ph.D. dissertation. The learning history may subsequently be repackaged for distribution in the form of the book to advance knowledge at a broader scale; the community will remain anonymous and will be reference by a generic title (i.e. Country Estate) within the dissertation and potential book.

Protection of privacy, rights and requirements

1. While individual identities will be masked, it is possible that those respondents having a “unique voice” will be recognizable within the community by their tone. Participants will be cautioned about this possibility in a formal consent agreement prior to participation. Each participant will have the opportunity to review and edit their own quotes before anyone else sees them. In all publications destined for distribution outside the project stakeholder group, a generic name will be assigned to the community as a whole.
2. All research activities connected with this project will be in full compliance with IRB Protocol.
3. No data set will be developed from the raw data that would be suitable for copyright, license, or patent. Publications developed by WVU employees on WVU time will be subject to WVU copyright. All exceptions will be negotiated through the WVU legal department.

Policies and provisions for re-use, re-distribution

1. Raw data in the learning history protocol may be sensitive in nature. Raw interview data should be restricted to the gathering/processing research and guarded while in use. Raw interview data should be responsibly destroyed at the earliest feasible moment.
2. Processed data may be freely shared.
3. Other communities (a) exploring their options for adaptively reusing a historic building and/or (b) using any of the research or management tools applied might be interested in this data.

Plans for archiving and Preservation of access

1. Raw data will not be retained beyond the publication of external documents.
2. Internal and external publications will be archived by the recipients, publishers, library holdings, etc.

APPENDIX E

Cover Letter



Davis College of Agriculture, Natural Resources and Design

Dear Participant,

This letter is a request for you to take part in a Learning History project to document the restoration and adaptive reuse of the Stowe Estate in Buckingham, United Kingdom. This research study I being conducted in pursuit of a Ph.D., but Anna Phoenix in the Division of Resource Management at West Virginia University. She will be working under the supervision of Dr. Barbara McFall, as Associate Professor in the Davis College of Agriculture, Natural Resources and Design. Your participation in this project is greatly appreciated and will include an interview that will take approximately one hour and will be voice recorded.

Your involvement in this project will be kept as confidential as legally possible. Your recorded interview will be quoted in the final report/publication; however you will not be listed by name but rather by a researcher created pseudonym. This will protect your identity while maintaining your unique "voice." You must be a least 18 years of age to participate. Your participation is completely voluntary. You may chose to skip any questions your do not wish to answer, or you may discontinue at any time. You are free to discuss any and all aspects of your involvement in the planning process, but are advised to speak carefully because you may be identifiable by your specific story or "voice." Voice recording tapes will be kept on file up to three years about the completion of the study.

West Virginia University's Institutional Review Board's acknowledgement of this project is on file.

I will be contacting you shortly by phone and/or email to schedule an interview. I hope that you will participate in this research project, as it could be beneficial in the understanding of future restoration and adaptive reuse projects. Thank you very much for your time. Should you have any questions about this letter or the research project, please feel free to contact Anna Phoenix at 01280 818140 until April 14th, 2011, after which you can reach her at (304) 685-7846 or by email at Anna.Phoenix@mail.wvu.edu. You may also contact Dr. Barbara McFall at (304) 293-3402 or by email at Barbara.McFall@mail.wvu.edu.

Thank you for your time and held with this project.

Sincerely,

Anna Phoenix

APPENDIX F

Informed Consent Form



CONSENT AND INFORMATION FORM

OMR ICF

Principal Investigator: McFall, Barbara
Department: AGRICULTURE & FORESTRY – Family & Cons. Science
Tracking Number: H-22857

Study Title:

Historic Preservation and Adaptive Reuse of a Historic English Country Estate, A Learning History

Co-Investigator (s): Phoenix, Anna

Sponsor: Barbara, McFall, Ph.D.

Contact Persons:

In the event you experience any side effects or injury related to this research, you should contact Dr. Barbara McFall at (304)293-3402. (After house contact Dr. Barbara McFall at (304)594-0717.)

If you have any questions, concerns, or complaints about this research, you can contact Dr. Barbara McFall at (304)293-3402.

For information regarding your rights as a research subject, you may contact the Office of Research Compliance at (304)293-7073.

Introduction

In addition if you would like to discuss problems, concerns, have suggestions related to research, or would like to offer input about the research, contact the Office of Research Integrity and Compliance at (304)293-7073.

You, _____, have been asked to participate in this research study, which has been explained to you by Anna Phoenix, B.S. This study is being conducted by Anna Phoenix, B.S. in the Department of Resource Management at West Virginia University sponsored by the Division of Design and Merchandising. This research is being conducted to fulfill the requirements for a doctoral dissertation in Human and Community Development in the Department of Resource Management at West Virginia University, under the supervision of Dr. Barbara McFall.

Purposes of the Study

The purpose of this study is to learn more about the restoration process of the Stowe Estate in Buckingham, England. WVU expects to enroll approximately 20-25 subjects; a total of approximately 20-25 subjects at all sites are expected to participate in this study.

Description of Procedures

This study involves an interview and will take approximately 1-2 hours for you to complete. You will be asked to participate in the interview regarding your involvement in the restoration of the Stowe Estate. You do not have to answer all the questions. You will have the opportunity to see the questionnaire before signing this consent form and to approve your transcript prior to publication.

Risks and Discomforts

The only possible risk anticipated is social (if you are identifiable in your story telling) and the mild frustration associated with answering the questions.

Alternatives

You do not have to participate in this study.

Benefits

You may not receive any direct benefit from this study. The knowledge gained from this study may eventually benefit others engaged in historic restoration efforts or employing Learning History as a methodology.

Financial Considerations

There are no special fees or payments for participating in this study.

Confidentiality

Any information about you this obtained as a result of your participation in this research will be kept as confidential as legally possible. Your research records and test results, just like hospital records, may be subpoenaed by court order or may be inspected by federal regulatory authorities without your additional consent.

Audiotapes or videotapes will be kept locked up and will be destroyed as soon as possible after the research is finished.

Your name will not be released in any publications that result from this research, however you will be referred to by a researcher created pseudonym if you agree and provide consent. You can decide to sign or not to sign this authorization section. However, if you chose not to sign this authorization, you will not be able to take part in the research study.

Persons/Organizations providing the information:

Interviewees

Persons/Organizations receiving the information:

Dr. Barbara McFall, Anna Phoenix, and the people and companies that they will use to oversee, manage, or conduct the research

The members and staff of any Institutional Review Board (IRB) that oversees this research study.

West Virginia University Office of Research Compliance and Office of Sponsored Programs.

The information is being disclosed for the following reasons:

Review of your data for quality assurance purposes

Publication of study results (without identifying you)

You may cancel this authorization at any time by writing to the Principal Investigator:

Dr. Barbara McFall

702 B Allen Hall

PO Box 6124

Morgantown, WV 26506-6124

U.S.A.

If you cancel this authorization, any information that was collected already for this study cannot be withdrawn. Once information is disclosed, according to this authorization the recipient may redisclose it and then the information may no longer be protected by federal privacy regulations.

This authorization will not expire unless you cancel it.

SIGNATURE

I have read this section and all of my questions have been answered. By signing below, I acknowledge that I have read and accept all of the above.

Voluntary Participation

Participation in this study is voluntary. You are free to withdraw your consent to participate in this study at any time. Refusal to participate or withdrawal will not affect your future career, [of your employee status at West Virginia University or your class standing or grade, as appropriate] and will involve no penalty to you. In the event new information become available that may affect your willingness to participate in this study, this information will be given to your so that you can make an informed decision about whether or not to continue your participation. You have been given the opportunity to ask questions about the research, and you have received answers concerning areas you did not understand.

Upon signing this form, you will receive a copy.

I willingly consent to participate in this research.

Signature of Subject or
Subjects Legal Representative

Printed Name

Date Time

The participant has had the opportunity to have questions addressed. The participant willingly agrees to be in the study.

Signature of Investigator or
Co-Investigator

Printed Name

Date Time

APPENDIX G

Stowe House Preservation Trust Strategic Plan 2011/2012

STOWE HOUSE PRESERVATION TRUST
STRATEGIC PLAN 2011/2012

INTRODUCTION AND CONTEXT

1. Stowe House, the ancestral home of the Temple Grenville family, was largely created by Viscount Cobham (1669–1749) and his nephew Richard Grenville-Temple, Second Earl Temple (1711–1779). The House has been described as the ‘largest and most completely realised private neo-classical building in the world’ (Michael McCarthy). The House is set in the world famous landscape gardens now managed by the National Trust. Together, the House and gardens feature work by the leading artists of the Georgian era. Capability Brown, Sir John Vanbrugh, James Gibbs, William Kent and Giacomo Leoni, Giovanni Battista Borra and Vincenzo Valdre all played a role in creating the house and surrounding grounds, which include forty temples or monuments. Sitting at the heart of this composition, Stowe House features a magnificent oval hall (‘The Marble Saloon’) at the centre of an enfilade of state rooms over a length of 150 metres.
2. A Board of Trustees oversees the Stowe House Preservation Trust (SHPT), which is responsible for the restoration, presentation and upkeep of the Grade I listed ducal palace, which it holds on a long lease from Stowe School, to whom the property is leased back for daily use. SHPT, working in partnership with the National Trust, manages Stowe House as an integral part of the heritage site, conducting tours of the house through arrangements with Stowe School. SHPT has embarked on an ambitious programme for the restoration of the House, covering six phases:
 - Phase 1: the North Front and Colonnades
 - Phase 2: the Central Pavilion and South Portico
 - Phase 3: the South Front
 - Phase 4: Nugent House and Power House Yard
 - Phase 5: Stables Court
 - Phase 6: the State Rooms
3. This work is being funded through generous donations from private individuals, members of the public, the World Monuments Fund, the Heritage Lottery Fund, English Heritage and other grant making bodies.
4. This Strategic Plan sets out the Trustees’ vision for the House and outlines the more detailed objectives that will be delivered in support of that vision. It supports the Strategic Plan for Stowe School outlined by the School Governors in “Towards 2023” and the National Trust planning for their new visitor centre at New Inn.

STRATEGIC INTENT

5. The SHPT Trustees will provide the leadership and professional judgement to ensure that Stowe House is restored to and presented at a standard that befits the national and international standing of the House and surrounding gardens. Their aims are:
- To secure the funding necessary to complete the six-phase restoration programme that began in 2000.
 - To ensure the highest quality of restoration work throughout.
 - To guarantee the authenticity of restoration work through rigorous academic research in support of the conservation and presentation of the House.
 - To produce a world class visitor experience, working with the National Trust to promote a “seamless” approach to visitor management throughout the site.
 - To widen participation and to promote the use of Stowe in support of diverse audiences.
 - To develop links with educational establishments in order to widen understanding of Stowe’s position in the history of the English country house and to further knowledge of the restoration programme and adaptive use of the Mansion.
 - To continue looking after the historic collections and working closely with the Hall Bequest Trust for future acquisitions and projects.
 - To develop, through a programme of training, high quality staff and volunteers, who are knowledgeable and engaging to all audiences.
 - To work closely with the National Trust and Stowe School in the day to day management of the estate.
 - To ensure the highest standards of compliance with current and future legislation relating to visitors, the environment and site management.
 - To work with Stowe School in managing the forward maintenance plan as defined in the restoration contracts.
 - To ensure financial and contractual propriety.

OUTCOMES TO DATE

Since its formation in 2000, SHPT has delivered the first two phases of the planned restoration to time and within budget. The first sub-phase of Phase 3, restoration of the South Front, has been delivered within budget and to the highest quality standards. The whole phase is on track for completion within the contracted timescales. Visitor numbers to the House were maintained throughout the restoration work and many positive comments were received in the first feedback survey to be completed at the House.

The heritage partnership with the National Trust and Stowe School continues to work well and all three organisations are working together to support the National Trust New Inn project. A draft Service Level Agreement has been drawn up with the National Trust to

outline arrangements for future visitor management and a an interpretation strategy for Stowe House has been completed as the first step towards the new visitor reception and interpretation centre. A bid to the HLF and other possible funders is being prepared for the design, build and delivery of the new interpretation centre.

SHPT finances are in sound order and a constructive relationship has been maintained with Her Majesty's Customs and Revenue in order to secure an acceptable arrangement for the rebate of VAT that is allowable against the building works. A good rapport has been maintained with the World Monuments Fund and consideration is being given to how best to spend a further generous donation of \$600,000 from the Robert Wilson Challenge Fund.

Maintenance plans have been drawn up as part of each restoration phase and these funding set aside to meet the obligations arising from those plans. Repairs were made to the north front steps following frost damage in the winter of 2010 as a maintenance operation and an inspection schedule has been drawn up to ensure a comprehensive approach and adequate financial provision for ongoing liabilities.

OBJECTIVES FOR 2011/2012

Objectives:

Activity	Actions	Frequency/ timescale	Responsibility
Restoration	Complete the restoration of the Grade I listed Mansion and ensure its maintenance into the future.	26 Aug 11	Prog Mgr
Restoration	Propose for Trustees' agreement, schedule of interior room restorations	End Apr 11	Prog Mgr
Restoration	Complete conversion of cellar to Interpretation Centre	Jul 12	Prog Mgr
Research	Commission research to support conservation and restoration programme and to further understanding of Stowe's history and significance	Ongoing – as required, particularly to support interiors restoration	Prog Mgr Visitor Services Manager (VSM)
Interpretation	Deliver highest possible quality interpretation centre in converted cellar	Sep 12	Project Team
Interpretation	Ensure coherence of cellar	Aug 11	VSM

	interpretation content with National Trust interpretation as developed for new Inn		
Education	Participate in joint partnership local community initiatives	Ongoing	VSM
Education and Outreach	Sustain and develop further links with local community	Ongoing	VSM
Education and Outreach	Deliver talks to local interest groups	Ongoing	VSM
Education	Develop links with universities to promote understanding of restoration and history of house	Ongoing	VSM/Prog Mgr
Marketing	Working with the NT and Stowe School, develop a joint marketing plan for “One Stowe”	Sep 11 (or publication deadline for NT handbook if earlier)	VSM
Events	Work with the NT to promote events that, jointly or separately, build the reputation of Stowe as a venue for high quality heritage events	Ongoing	VSM Stowe Enterprises Venue Manager
Visitor Management	Conclude with the NT and Stowe School a SLA for implementation in sequence with the NT plans for New Inn.	June 2011	Prog Mgr/ VSM

IMPLEMENTATION

This plan will be developed into more detailed objectives for individuals and various sub projects. These will then inform personal job descriptions, annual objectives with performance standards and personal development

APPENDIX H

Heritage Management Plan

STOWE SCHOOL
A HERITAGE MANAGEMENT PLAN
FOR JOINT DEVELOPMENT OF THE STOWE ESTATE

AIM OF THIS PLAN

1. Management of the Stowe Estate is a complex challenge, involving three partners and requiring a sensitive and thoroughly documented approach to reconcile the needs of heritage visitors with those involved in running one of the leading British Public Schools. This plan has been produced to document Stowe School's approach to that challenge. The aim throughout has been to maximize the visitor experience and build on the public benefit delivered by Stowe School whilst respecting the School's primary educational outputs and duty of care to pupils. In due course, the plan will lead to development of a Service Level Agreement based on a shared understanding and clear principles detailing specific objectives for Stowe School, the National Trust and the Stowe House Preservation Trust.

OBJECTIVES

2. As the partners responsible for the Stowe Estate, the School, the National trust and the Stowe House Preservation Trust has the following shared objectives:
 - a. Provision of an environment in which Stowe School pupils and visitors co-exist without detriment to either or compromise of legal obligations.
 - b. Development of joint strategies for interpretation and visitor management.
 - c. Promotion of major events and respective brands.
 - d. Generation of funds for future restoration programmes and maintenance.

BACKGROUND

3. The Stowe Estate. Located to the north of Buckingham (Ordinance Survey Reference SP666 366), Stowe House, the ancestral home of the Temple Grenville family, was largely created by Viscount Cobham (1669-1749) and his nephew Richard Grenville-Temple, Second Earl Temple (1711-1779). The mansion has been described as the 'largest and most completely realized private neo-classical building in the world' (Michael McCarthy) and it is set in the world famous landscape gardens now managed by the National Trust. The house and gardens feature work by the leading artists of the Georgian era; Capability Brown, Sir John Vanbrugh, James Gibbs, William Kent and Giacomo Leoni, Giovanni Battista Borra and Vincenzo Valdre all played a role in creating the house and surrounding grounds, which include forty temples or monuments. Sitting at the heart of this composition, Stowe House features a magnificent oval hall ('The Marble Saloon') at the centre of an enfilade of state rooms over a length of 150 metres.
4. The Family. In just over 200 years, from the Elisabethan era to the reign of George IV, the Temple family rose from sheep farmers to the highest-ranked peer, a Duke. They played a leading role in the arts and politics of the eighteenth century, with four prime ministers coming from the family or its close relatives. Many members of

- European and Russian royal families visited over the years, culminated in a three day visit by Queen Victoria and Prince Albert in 1845. In 1848, however, over-spending led to the great sale of the House contents. The third Duke of Buckingham and Chandos died in 1889 leaving the estate to his daughter, Lady Kinloss.
5. Stowe School. When Lady Kinloss's eldest son was killed in the First World War, the Stowe Estate was sold to Harry Shaw. Unable to present Stowe to the nation due to the lack of an endowment, he resold it, separating the House and Gardens from the contents once again. It was saved by the foundation of Stowe School in 1923. Stowe School's first headmaster, J.F. Roxburgh was resolute that every pupil leaving Stowe would "know beauty when he sees it all his life." Since 1923, the School has continued to develop the site adding significantly to the architecture on site through development plans which will continue into the foreseeable future. The School is conscious of its responsibilities in terms of encouraging visits to the House to ensure a meaningful visitor experience that maximizes visitor satisfaction and encourages understanding of this unique environment. Moreover, the School has a role to play in meeting conditions for access to sustain the support of donors and benefactors who generosity has made and continues to make possible the essential restoration programme.
 6. Site Management. Management of the site is, therefore, now the responsibility of three partners; the National Trust, Stowe School and the Stowe House Preservation trust established in June 1997, "to restore and preserve Stowe House for the benefit of the nation and the public." This Trust now owns Stowe House on a 99 year lease with the School as its tenant. This management plan sets out Stowe School's role in encouraging and sustaining an harmonious shared responsibility for the future management of the House.
 7. Aspirations and Aims. Management will be a complex situation involving:
 - a. Access to the site via the National Trust.
 - b. Receipt of income for house visitors and the share of that income.
 - c. Retail opportunities.
 - d. Provision of intellectual materials and the management and development of that provision
 - e. Access to rooms and the relationship between the school's need to commercially rent rooms and funders' expectations for access to them.
 - f. Refreshments and toilet provision.
 - g. Visitor management within term-time and out of term.
 - h. Maintenance of conservation-standard refurbishments with sufficient expertise.

These requirements will draw on the relevant capacities and skills of stakeholder staff. Without agreement of the partners to address these issues, the future usage and direction of the building will be unpredictable and that would be unacceptable to funders of restoration works. The plan therefore lays out the issues to be resolved in preparation for a Service Level Agreement between the partners for day to day management of the site.

CHALLENGES

8. The World Monuments Fund Britain (WMFB) has articulated a clear linkage between the public benefit that accrues from increasing access to the restored building by a range of audiences with the philanthropic ideals of its benefactors. Through this same linkage, the WMFB is also able to satisfy the conditions of its charitable status, and to raise funds for further restoration work, including the interiors of the State Rooms. WMFB's expectation is therefore that this management plan will provide a comprehensive solution for the site's maintenance and usage and a document that will satisfy funders of the optimal value and maintenance of their investment.
9. It is important to produce sufficient clarity to enable the partnership to proceed according to medium-term and long-term plans. Once this is agreed, WMFB can produce fundraising materials including application letters, a brochure and film content demonstrating sufficiently robust vision achievable through agreed methods to satisfy funders and also satisfy WMFB that the funds sought will be spent on a scheme that combines the benefits of practical restoration with predictable and high-quality access to Stowe House. This scheme must also marry with the National Trust offer for the gardens, providing exemplary accommodation and benefits for different target audiences and work with the local community through use of the School's facilities. The management plan therefore addresses the following specific challenges:
 - 9.1 Understanding Stowe School's current operation of the building both during term-time and out of term-time whilst also satisfying the School's commercial operations in and out of term-time.
 - 9.2 The need for due allowance for stakeholder feedback to establish the level of commercial exploitation of the house that is deemed reasonable at different periods of the year.
 - 9.3 Agreement on the level of public access that funders will deem to be reasonable in return for the high level of charitable and philanthropic investment from which the school has benefited.
 - 9.4 Co-ordination of the school's commercial plan with the SHPT and with the National Trust's access plan for the site, including management at the interface of gardens and house at different times and resolution of any inherent conflict of demand at particular times.
 - 9.5 Harmonisation of public access to various spaces with School routines.
 - 9.6 Providing for necessary income generating visitors, whilst mitigating the effects on the School of increased numbers.
 - 9.7 Developing a formal visitor management plan to link access to the Mansion with National trust plans for increased visitor numbers following their creation of a new visitor reception area.

9.8 Agreeing an appropriate conversion rate to house visitors from the garden.

9.8.1. Catering for an increase in visitors to the House while:

9.8.2. Managing visitor capacity in term time.

9.9 Managing limitations that may be placed on visitor numbers by assessments on wear-and-tear, floor-loading, supervision, health and safety.

9.10 Actioning those assessments, and feeding that information into the plan to gauge the optimal numbers of visitors to the interpretation centre and to the main rooms when open.

9.11 Mixing free flow and guided visits.

9.12 Sustaining a strong working relationship with the National Trust.

9.13 Offering a curatorial policy for the presentation of the interiors, the supervision of their condition, approvals policy for accretive change, and auctioning and monitoring appropriate small-scale repairs.

THE PARTNERS

10. The School shares responsibility for managing, promoting and displaying the Stowe Estate with the National Trust and the Stowe House Preservation Trust. The three bodies meet monthly as the Stowe Partners' Working Group under the strategic guidance of the Stowe Partners' Policy forum.

11. Current Projects. The partners each have a number of projects underway which could, if not managed collectively, impact adversely on each other. However, jointly managed, these projects have the scope to improve the visitor experience.

11.1 New Inn-the National Trust. Responsible since 1989 for the 750 acres of Landscape Gardens and their 40 monuments and temples, the National Trust is now developing New Inn as the principal visitor entrance and interpretation centre, thereby restoring the original entrance to the estate. The New Inn entrance will open in the summer of 2011 and, from that point, all visitors will approach from the south.

11.2 Phase 3 Restoration-SHPT. Under the direction of the SHPT, the Phase 3 restoration programme of Stowe House will see the exteriors of the east pavilion secured and the interiors of the library and ante library restored by June 2010. Subject to funding, it is hoped to extend the contract to cover the exteriors of the west pavilion from that date with completion envisaged in late 2010, after which attention can turn to the interiors. SHPT has, through the generosity of benefactors, already delivered the first two phases of the programme, namely the restoration of the north front and colonnades and the south portico. The Hall Bequest Fund and WMF Robert Wilson Challenge Fund has made possible the restoration of the Marble Saloon.

11.3 Expansion and Development-Stowe School. Stowe School now has 760 pupils and has a programme for development of the site through the delivery of high quality architectural projects that will maintain the School's position as a leading public school providing for the academic, pastoral and sporting needs of its pupils. The engagement of leading architects from Sir Clough Williams-Ellis through Sir Robert Lorimer to Rick Mather constitutes the School's contribution to the site's heritage, which is potentially of significant interest to visitors, given the role played by the School in saving the site.

APPENDIX I

Powerpoint Slides from Defense Presentation March 20, 2012

Restoration and Adaptive Use of an English Country House: A Learning History



Anna D. Phoenix

Ph.D Candidate in Human and Community Development
Davis College of Agriculture, Natural Resources and Design

Kathryn Burton, Ph.D., Chair

Cindy Beacham, Ph. D.

Melissa Bingmann, Ph. D.

Anna McEvoy

Barbara McFall, Ph. D.



Stowe is an English country house that has been adaptively used as a boarding school, serves the public as a house museum and is undergoing a six-phase restoration.

Preservation Theories



- ☞ Eugene Emmanuel Viollet-le-Duc (1814-1879)
 - ☞ “To restore a building is not only to preserve it, to repair it, or to rebuild, but to bring it back to a state of completion such as may never have existed at any given moment” (Hearn, 1990, p. 269).
- ☞ John Ruskin (1814-1900)
 - ☞ “Restoration means the total destruction which a building can suffer” (Ruskin, 1969, p. 199).
- ☞ William Morris (1834-1896)
 - ☞ Considered restored or reconstructed buildings to be “shams” (Summerson, 2983, p. 24).

3

Preservation Theories



- ☞ Philip Johnson (1906-2005)
 - ☞ Believes preservation should reflect change and not put the past in a bubble (as cited in Tyler, 2000, p. 30).
- ☞ Robert Venturi (1925-)
 - ☞ Sought to reestablish a conscious sense of the past



Strategies for Preservation



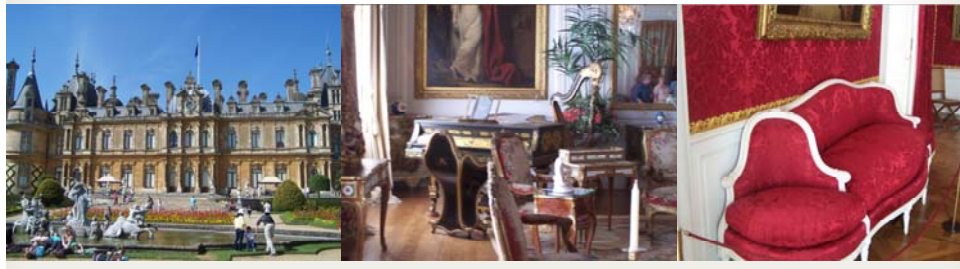
- ☞ “It is better to preserve than to restore and better to restore than reconstruct” A.N. Didron (1806-1867), French archaeologist, *Bulletin Archéologique*.
- ☞ **Preservation:** a no harm approach
- ☞ **Restoration:** returning to former condition
- ☞ **Reconstruction:** reproduction through new construction
- ☞ **Adaptive Use:** creating a new use for an existing building

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House Museums



- ☞ “A museum whose structure itself is of historical or architectural significance and whose interpretation relates primarily to the building’s architecture, furnishings and history” (as cited in Murtagh, 2006, p. 63).



Historic Site Stewardship



- ☞ Kykuit Conference (2007) was a pivotal step toward recognizing the need of historic sites to be relevant to their community and the development of new standards specific to the management of historic sites.
- ☞ “Meticulously preserved buildings, beautifully restored landscapes, carefully researched period rooms and dutifully catalogued collections will not ensure a site’s survival if no one visits. In the end, we will fail as stewards of these sites if the public is not as passionate about their survival as we are” (Vaughan, 2008).

7

English Country Houses



- ☞ English country houses were once a way of life in England and represented the power of their owners
- ☞ Society changed during the Industrial Revolution leading into the turn of the 20th century and WWI and WWII
- ☞ Many English country houses have been abandoned since the turn of the 20th century
 - ☞ due to the high expense of upkeep
 - ☞ lack of heirs
 - ☞ increased inheritance tax
- ☞ What’s become of the remaining houses?

8

Stowe House History



- ☞ Stowe House, an 18th century Neo-classical ducal palace, was historically home to the Temple-Grenville family, prominent political figures during the 18th and 19th century. The house is surrounded by over 400 acres of landscaped gardens.
- ☞ In 1923 the estate was adaptively re-used as a private boy's boarding school, called Stowe School (Bevington, 2002).









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Formation of Stowe House Preservation Trust

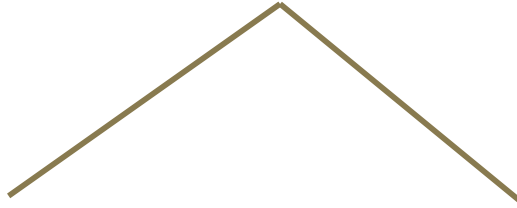
- ✧ The property was in need of attention and the School could not afford the repairs.
- ✧ The English National Trust obtained stewardship of the Gardens in 1989.
- ✧ Stowe House Preservation Trust was formed in 1997 to obtain funding, and manage the house restoration and visitor services.



The Stowe Partnership



STOWE SCHOOL
BUCKINGHAM ENGLAND



STOWE HOUSE
BUCKINGHAM ENGLAND



National Trust

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Problem Statement



Within the field of historic preservation, often a single strategy for preservation is chosen from preservation, restoration, adaptive use or reconstruction. Occasionally it is appropriate to simultaneously implement two or more of those strategies. Adopting multiple strategies requires the involvement of different organizations whose goals and philosophies may clash. Stowe House is an example where preservation strategies restoration and adaptive use were applied in tandem, forming the partnership of Stowe School, Stowe House Preservation Trust and the English national Trust. In this case forming a symbiotic tripartite partnership has resulted in the long-term survival of the Stowe estate.

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Research Questions



1. What are the lessons learned from the experience of participants engaged in a site that has been both adaptively used for a modern purpose and restored as a house museum open to the public?
2. How might experiences and lessons learned be analyzed and synthesized then used to inform subsequent projects both at Stowe and elsewhere?



Learning History Method



- The Learning History Method (LHM), with its requisite interviewing process, was used as a means to
- Record
 - Validate
 - Analyze
- various perspectives related to the preservation and management of Stowe House.

Learning History Method



- ⌘ Developed at MIT, by Art Kleiner and George Roth
- ⌘ A case study approach which tells the story of change in an organization
- ⌘ Through interviews, each participant is able to anonymously communicate their own unique experience.
- ⌘ The interviews are:
 - ⌘ Transcribed by the researcher
 - ⌘ Validated by the participants
 - ⌘ Analyzed by the researcher to create an overarching narrative reflective of the change process as seen through a variety of lenses.

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The Epsilon Project is "Worse than Red!"

As they practiced their new management approach, the Epsilon product launch team came to feel isolated from the rest of the AutoCo culture. They felt that senior managers sometimes applauded them, sometimes supported them, sometimes ignored them, and sometimes invalidated their efforts. Meanwhile, some senior leaders perceived the Epsilon team as withdrawing into its own "true believer" approach — as if Epsilon leaders felt that they knew how to achieve results that the rest of the AutoCo organization did not. This problem came to a head several "change requests" (CRs) — the engineering reports of issues, problems and impending changes on a part — which reached a count of 524, at a time when a more typical car launch would have a high of 200.

From other perspectives, the use of CRs caused confusion. Some managers outside the Epsilon team expressed frustration over the visible new signs of stress.

Senior manager: In manufacturing operations we have a method that starts with green and goes to yellow and goes to red. The Epsilon program was 'purple.' I said, 'that's worse than red!' I've had a unique ability to say what's ready or not, and he said 95% of the time. The Epsilon wasn't ready. The patient was terminal. I recommended postponing the launch date.

Epsilon team manager: "Initially, I was really good about our CR count. It was fantastic to find out about all these things and have them worked on. My encouraging employees to write concerns," I said to our Vice President, "we're actually getting work done earlier and we'll have a better quality product. This is a change in our system and we need to keep at that way. We want it to be not punitive for an employee to write a concern early." (The Vice President nodded and listened. But after the meeting he still said the program was out of control.)

What made it difficult for Epsilon managers to explain their strategy and behavior in precisely early reports of concerns?

The learning history is organized by themes that were identified by the researcher as reoccurring in the data.

The full column prologue offers background information and facts that can be universally agreed upon.

The right hand column presents the relevant events through the interwoven quotations of people who took part in them as well as those who were affected by them or observed them.

The left-hand column includes the learning historian's analysis, commentary, insights, questions, reflections and perspectives.

Image modified by researcher (Kleiner & Roth, 1997).

24

Significance of LHM



- “Structures of which we are unaware hold us prisoner. Conversely, learning to see the structures within which we operate begins a process of freeing ourselves from previously unseen forces and ultimately mastering the ability to work with them and change them” (Senge, 2006, p. 93).

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Significance of LHM



- The Learning History document presents the restoration process of Stowe House in narrative form, giving both those involved with Stowe and those involved in the field of historic preservation a learning document.
- The completed narrative has the potential to inform future decisions made at Stowe and will also explain the complicated threefold partnership and reveal opportunities for further collaboration between the three entities.

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Research Design



- ☞ Participant Selection
- ☞ Interview Development
- ☞ Institutional Review Board (IRB)
- ☞ Design for Dependability
 - ☞ Consistency of behaviors in research design (Ary, et al., 2009, p. 501).
- ☞ Design for Credibility
 - ☞ Participants viewpoints, thoughts, feeling, intentions and experiences were accurately presented through referential adequacy (Johnson & Christensen, 2000, p. 209).
- ☞ Design for Utility
 - ☞ The LHM is not generalizable to other situations, but it is useful to other organizations

27

Data Collection



- ☞ Spent January 14-April 14 2011 living on site at Stowe House
- ☞ In the beginning observed, collected documents, attended meetings, networked
- ☞ Obtained IRB approval
- ☞ Eleven potential participants were identified and contacted with the IRB approved cover letter
- ☞ Nine responded and interview times were scheduled.

28

Data Collection



- ☞ Participants had time to review and ask questions about the informed consent form before signing at the beginning of the interview.
- ☞ Interviews were:
 - ☞ Voice recorded
 - ☞ Conducted at the location of the interviewees choice
 - ☞ Transcribed by the researcher
 - ☞ Securely stored in password protected electronic documents
 - ☞ Paper documents securely stored in Division's office
 - ☞ Transcripts were sent to participants for validation, eight of the nine participants responded

29

Reoccurring Themes of the Learning History



- ☞ Balancing the Partnership
- ☞ Restoration Planning
- ☞ Restoration Conflicts
- ☞ Various topics related to:
 - ☞ Stowe House Preservation Trust
 - ☞ The English National Trust
 - ☞ Stowe School
- ☞ Conflicts and Collaborations between each of the three entities
- ☞ Potential of Stowe

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Learning History: Positives



- ☞ Forming a qualified restoration team
- ☞ Developing a restoration philosophy
- ☞ Fundraising
- ☞ Successful collaborations between all three of the entities.

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Formation of a Qualified Restoration Team



SHPT has been able to construct a team of professionals who are dedicated to the project and also work well together.

“Doing the Marble Saloon early showed what a great team we had...which we still have today...And everyone was very, very tolerant, and of course even if it’s my real first experience of working in such a large scale project like this, I don’t have any other benchmark to know what’s good and what’s bad, but loads of people have told me that everyone said it was a really, really good team. And working with them is great” (Interviewee 3, personal communication, April 7, 2011).

32

Fundraising



HLF grants come from the Ministry of Culture, Media and Sport.

SHPT has also received funds from an anonymous benefactor and the Robert Wilson Heritage Fund.

2000, when they get their first HLF grant to do the whole of the North Front, basically almost 90% they got from HLF to do the whole of the North Front (Interviewee 3, personal communication, April 7, 2011).

The one anonymous benefactor who gave £5 million ... And again have to say huge generosity from Robert Wilson's Foundation and I think a personal interest from Robert Wilson himself. He funded the Marble Saloon (Interviewee 4, personal communication, April 7, 2011).

33

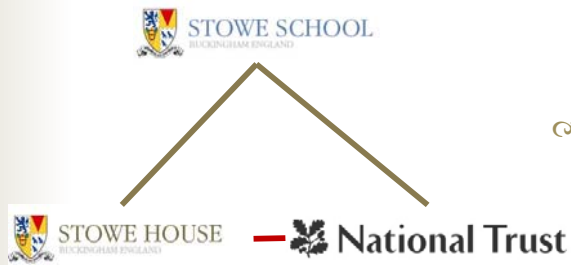
Visual Education Program



- ☞ A course taught by SHPT staff to first year pupils at Stowe.
- ☞ Instill in pupils a sense of appreciation for the historical significance of the house and gardens.

34

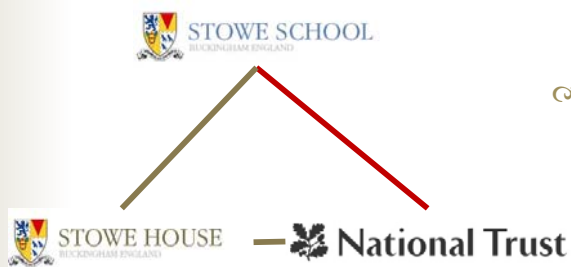
Stowe Aspirations and Inspirations Program



- Invites underachieving students from Milton Keynes to Stowe House for a field trip.
- The students curriculum is integrated into a day of touring and exploring the House.

35

Service at Stowe



- Example: conservation tasks such as building bird boxes
- Orienteering trail

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Learning History: Negatives

- ⌘ Research
- ⌘ Project Managing
- ⌘ Governance issues
- ⌘ Staffing
- ⌘ Marketing
- ⌘ Professionalism
- ⌘ Conflicts between each entity

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Research

How should research be done? First or allow for new possibilities as you are doing the restoration?

The governance structure starts to hold them back, example the Interiors Working Group is meant to be doing this research, but it's not getting done because of the set up of that committee.

"Just doing your research properly, trouble is, I don't know what comes first, it's easy for me to criticize, because it could be that we didn't know until we got to that point. But I think there's elements of that, but there's other of just not actually thinking, sitting down properly and thinking, but then that's what the Interiors Working Group is supposed to do, but it's not [what they do] it's just talking shop for people who like talking about interiors" (Interviewee 3, personal communication, April 7, 2011).

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Attitude of School toward SHPT

Participant points out that the House has to be open not because they just want to be open or the SHPT likes inconveniencing the School, but because they have received public money. Suggests an attitude change, the School's enjoyment of nicely restored rooms comes with the responsibility of opening those rooms to the public.

"The School currently takes complete precedent, and I can appreciate that from some aspects. The School saved the House from being torn down, and I think that's something that everyone has in the back of their minds, but I think there needs to be a slight attitude change in the fact that we're not here causing a nuisance. We're not opening the House because we like opening the House, we're opening the House because it has to be open, because if you're going to have the rooms funded by public money, they need to be publicly accessed" (Interviewee 1, personal communication, April 11, 2011).

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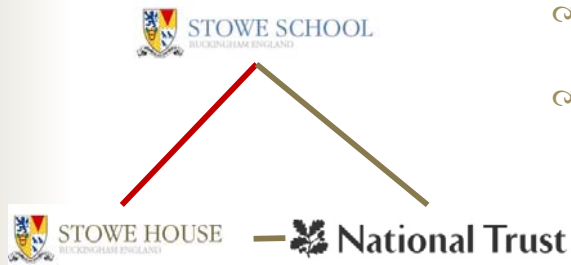
Restoration's effect on pupils

Knowing the academic and seasonal rhythms of life for the students would help to plan particularly intrusive restoration work around those times.

"So I think there is a natural rhythm that goes on here and I suspect the restoration affects them most probably in the short period up to Christmas and the period from Christmas to Easter. But I think certainly in January, February, March, they are the times which probably their patience is tested most. Now the condition of the restoration won't change between September and June, but actually their response to it does change" (Interviewee 2, personal communication, April 7, 2011).

40

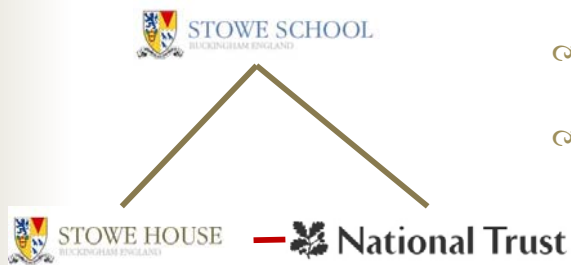
Conflicts



- Physical space
- Need for acceptance of SHPT's work
- Public funds require public access

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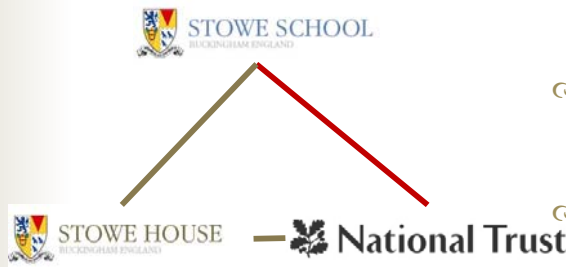
Conflicts



- Can view each other as competitors
- ENT has slight monopoly on visitors
- ENT staff not informing visitors of the house's opening information

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Conflicts



- ⌘ School's inappropriate use of garden lands in the past
- ⌘ School's need to expand for school facilities
- ⌘ In the past, poor-interpersonal skills

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Potential of Stowe



- ⌘ Forming partnerships with local universities
- ⌘ Better retail offerings
- ⌘ Catering facilities in Stowe House
- ⌘ More entertainment programs
 - ⌘ Reenactments,
 - ⌘ Creation of an annual event
 - ⌘ Art exhibits
- ⌘ Renting the facility out for day conferences
- ⌘ Architectural/art history courses

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Discussion



- ☞ The operation of Stowe School within the Stowe estate gives Stowe House a purpose and ultimately preserves the house.
- ☞ SHPT alone would not be able to maintain Stowe House or attract enough visitors to remain a sustainable organization.
- ☞ Without SHPT, the school would not be able to afford the restoration that allows them to live and work within such beautiful surroundings.

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Discussion



- ☞ All three partners must continue to develop a mutually beneficial, symbiotic relationship. Even if they do not recognize it, each organization is already benefitting from the others and surviving as a result.
- ☞ The LHM allowed participants to anonymously voice their concerns, fears and future hopes of Stowe without fear of reproach.
- ☞ This allows everyone involved to reflect upon what has happened, and how things can be improved.

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Discussion



- ☞ Many English country houses are in the same situation as the Stowe estate.
- ☞ Involving a second or third conservation organization into the operation of country houses is becoming more and more essential to the restoration of country houses.
- ☞ Stowe is an example of how country houses with two or more partner organizations can manage their relationships

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Further Research



- ☞ LHM as a means of documenting and analyzing restoration and adaptive use projects.
- ☞ Application of the partnership model to American house museums.
- ☞ Survey of pupils and alumni to gauge how they view living in such a grand space, and how it has influenced their future homes and careers.
- ☞ A second learning history at Stowe at the completion of all restoration works.

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Thank you!
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