

## ABSTRACT

Title of Document:

**PRESERVING RURAL HISTORIC  
PROPERTIES: HELPING OWNERS HELP  
THEMSELVES**

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Preservation, 2016

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Rural historic properties are threatened by both insufficient owner resources and external development pressures. Even in jurisdictions with strong protections for historic sites, property owners are often ill-equipped to address the restoration and maintenance requirements of the structures in their stewardship. A variety of onsite income-producing uses could help rural historic properties be self-supporting, but little guidance exists to help owners determine what uses are most appropriate to their situation. By referencing the available literature and examining the successes and failures at three case study properties, a set of reuse feasibility factors are identified that can form the basis for guidance usable by rural historic property owners. While this research can be applied broadly, a series of recommendations specific to Prince George's County, Maryland, shows how reuse feasibility guidance can not only help property owners but also advance a jurisdiction's historic preservation agenda.

PRESERVING RURAL HISTORIC PROPERTIES:  
HELPING OWNERS HELP THEMSELVES

By

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Final paper submitted to the Faculty of the Graduate School of the  
University of Maryland, College Park, in partial fulfillment  
of the requirements for the degree of  
Master of Historic  
Preservation  
2016

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## Dedication

This project is dedicated to my wife, Kristi Jamrisco Gross, whose unfailing support and friendship has sustained me through two and a half years of graduate school, and to our son, Julian, a source of constant joy who I hope will grow to love old places just like his old man.

## Acknowledgements

I would like to acknowledge several individuals who provided invaluable assistance over the course of this research project. I am especially indebted to the stewards of the three case study properties—John M. Walton, Jr. at Poplar Hill on His Lordship’s Kindness, Angel Forbes Simmons at Villa de Sales, and Margaret Piatt at the Piatt Castles—without whose cooperation my research would have been woefully incomplete. Their many years of dedication to preserving the properties in their care will continue to serve as a source of professional and personal inspiration.

I am grateful to Douglas R. Horne of D.R. Horne & Company for relating his experience as part of the National Trust for Historic Preservation’s Rural Project and as a private consultant engaged in reuse feasibility assessment at historic properties. Margaret DeArcangelis of Preservation Maryland provided useful information related to past and present state-level initiatives aimed at rural heritage conservation.

Two adjunct members of the Historic Preservation faculty were particularly helpful to me during this project. Fred Stachura of the Maryland-National Capital Park and Planning Commission helped me understand the specifics of Prince George’s County’s historic preservation policies. Brent Leggs of the National Trust for Historic Preservation not only provided valuable feedback on the draft of this paper but was instrumental in shaping my overall approach to the research subject.

I owe special thanks to Dr. Dennis Pogue for helping me shepherd this final project from conception to completion. Aside from helping me understand the challenges of rural preservation, his constructive criticism (and skepticism) over the course of my research forced me to develop and articulate my arguments with care.

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## Chapter 1: Introduction

This paper seeks to provide guidance to help rural historic property owners assess the feasibility of onsite income-producing uses. Chapter 2 offers an overview of the internal and external threats facing rural historic preservation, while Chapter 3 discusses how the urgency of addressing these challenges is illustrated in a particular jurisdiction, Prince George’s County, Maryland. A literature review is presented in three parts in Chapter 4, examining academic treatments of rural heritage conservation and preservation economics, the experience of “country house” preservation in Great Britain, and available reuse feasibility guidance that may be useful to historic property owners. Three case studies are presented in Chapter 5 that illustrate the challenges facing rural historic properties and the approaches taken by their owners to generate onsite income, with an eye toward identifying factors both common and unique that have affected outcomes at the three sites.

With lessons learned from the literature review and case studies, Chapter 6 outlines a set of considerations that rural historic property owners can use to inform their own reuse feasibility analysis. The considerations are grouped within three broad categories: site-specific attributes, which include both structural conditions and characteristics of the property; the local market and regulatory landscape, which speaks to the context in which the property is located; and owner resources and constraints, which includes such factors as access to capital and professional experience that prepares an owner to run a small business on a historic property. The list of considerations is not exhaustive, and the paper acknowledges that free advice is a poor substitute for the services of a professional consultant who specializes in the

reuse of historic properties. The goal of this paper is to provide a resource to help the many property owners for whom such services are cost-prohibitive, in order to help them make better-informed decisions through their own process of analysis.

The paper concludes in Chapter 7 by discussing how reuse feasibility guidance for rural historic property owners could strengthen the preservation regime of Prince George's County. The paper argues that providing information to property owners along the lines of the reuse feasibility considerations outlined in Chapter 6 could help the County Historic Preservation Commission fulfill its responsibilities under the historic preservation ordinance contained in Subtitle 29 of the County Code. At the same time, promoting good stewardship of rural historic properties by helping owners generate income would also advance other County priorities including economic development and agricultural land conservation. Specific recommendations are provided on how the proposed guidance could be developed and distributed to rural historic property owners in the county.

## Chapter 2: Threats to Rural Historic Preservation

There are both internal and external threats to rural preservation. The most significant internal threat—that is, the biggest factor that works against preservation regardless of the context—is the lack of funding to carry out the restoration, rehabilitation, and maintenance activities necessary to ensure the long-term survival of historic buildings. This issue is universal, affecting properties both urban and rural, with little regard for the age of a structure or its style of construction. The scale of the financial threat will vary, and with it the scale of its solution, based on a range of site-specific factors that include the size of the building, its baseline condition, and the amount of money that an owner has readily available or can secure with reasonable effort. A Cape Cod-style single family home in need of new siding is less threatened by inadequate funding than, say, a five-part Georgian manse with a subsiding foundation. Likewise, a property bequeathed by its owner to relatives of modest means faces a more daunting financial challenge than a building of the same size and condition donated along with an endowment dedicated to its preservation.<sup>1</sup>

The external threats to rural preservation—those factors that work against preservation regardless of the property involved—are more situational than the straightforward need for money. Rural historic properties may be more or less threatened by external factors depending on both the location and the time period.

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<sup>1</sup> The importance of endowments has long been recognized in the historic preservation community. The 1937 Annual Report of the Society for the Protection of New England Antiquities notes that the “principal drawback” to plans for opening a museum in a recently acquired house was the lack of an endowment. The successor organization to SPNEA, Historic New England, now requires that donated properties be accompanied by an endowment. See Carl R. Nold, “Why Do We Own: Alternatives to the Historic House Museum,” Boston: Historic New England, 2007.

<sup>2</sup> In explaining preservation easements, the Preservation Leadership Forum of the National Trust for Historic Preservation calls the subdivision of land surrounding a historic building “inconsistent with the preservation of the property.” “Preservation Easements,” National Trust for Historic Preservation,

The most significant external threat generally takes the form of suburban (and exurban) development. The pressure to accommodate additional population and business activity raises the value of land outside the existing urban fringe and makes it more difficult to economically justify retaining a large property as simply an historic setting. A rural property owner, particularly one facing the internal threat of inadequate funds, is hard pressed to ignore the easier and more lucrative solution offered by developers. In some cases, historic structures are retained at the cost of their newly subdivided and developed historic settings. The merits of this solution—or whether it can rightly be called as such—are a subject of considerable debate in the preservation field.<sup>2</sup> Suffice to say, development pressure poses an existential threat to rural historic properties, although not to the same degree in every location or period.

A related external threat to rural preservation is public policy. Particularly at the local level but also more broadly, the attitudes that citizens hold toward historic properties are enshrined in legislation and regulations that either incentivize or discourage rehabilitation and maintenance. Such policy may take a variety of forms, from a local tax credit that allows owners to reduce their property tax liability by completing approved preservation projects, to a state policy that steers development toward urban infill rather than sprawl, to the federal review requirements found in Section 106 of the National Historic Preservation Act. Well-intentioned public policy

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<sup>2</sup> In explaining preservation easements, the Preservation Leadership Forum of the National Trust for Historic Preservation calls the subdivision of land surrounding a historic building “inconsistent with the preservation of the property.” “Preservation Easements,” National Trust for Historic Preservation, <http://forum.savingplaces.org/learn/fundamentals/preservation-law/easements>. A different perspective is offered by Dan Morrill, consulting director of the Charlotte-Mecklenburg (NC) Historic Landmarks Commission in reference to the subdivision of a 245-acre farmstead: “This is an accepted practice... The real key issue is the setting of the house—if it has enough space to retain something of the rural feel.” <http://www.historichouseblog.com/2009/01/14/preserving-historic-estates-through-subdivisions/>

might work against preservation if applied inappropriately, such as in the form of onerous permitting requirements that discourage owners from disclosing to authorities the work they do on their properties. Policies also exist that are clearly at odds with preservation, when their explicit purpose is to encourage outward growth without regard for what stands in the way.<sup>3</sup>

In most respects, historic properties owned by public agencies or nonprofit organizations are subject to the same internal and external threats even if conventional wisdom suggests otherwise. Preservation advocates might feel that the future of a beloved historic building would be secure if only the state would purchase it—because *surely* it has the money to do so. This mindset results from the experience of well-known properties that are publicly owned and well preserved, but these cases are atypical. Governments have more money than do private citizens, but they also face vastly more demands on their money and restrictions on its expenditure. The agencies charged with historic property stewardship are also generally not among the most powerful or well funded, and their priorities are subordinate to concerns such as economic development and public safety. Elected officials may be personally supportive of preservation but generally are neither voted into office on that basis nor willing to risk much political capital in its defense. Thus, public ownership should not be seen as a likely solution to the internal or external threats to preservation.<sup>4</sup>

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<sup>3</sup> A recent policy in Maryland criticized by opponents as encouraging sprawl is a Department of the Environment directive stating that advanced nitrogen-removing septic tanks will no longer be required for new development except on lots within 1,000 feet of Chesapeake Bay tributaries. The policy substantially reduces the cost of installing septic systems for new development in rural areas. See Tom Pelton, “Gov. Hogan Rolls Back Pollution Rules for Sprawl Development,” WYPR, August 23, 2016, <http://wypr.org/post/gov-hogan-rolls-back-pollution-rules-sprawl-development>

<sup>4</sup> Sites in Prince George’s County, Maryland, illustrate the limitations of public ownership. Riversdale, in Riverdale Park, was sold to the Maryland-National Capital Park and Planning Commission in 1949

Neither is nonprofit ownership a way of avoiding these threats. It might seem that historic properties would benefit from the institutional heft of a nonprofit relative to remaining in private hands, but even a highly dedicated and knowledgeable organization is limited in what it can do. Again, the chief concern is money. Properties conveyed to a nonprofit along with a substantial endowment have some hope for the future if the board manages its affairs prudently, but a lack of initial funding or profligate spending that quickly diminishes an endowment's corpus can easily consign a property and its future stewards to ever-growing challenges. Also, nonprofit organizations are by no means immune to threats from ambitious developers and the governments that enable them. Their tax-exempt status requires that they provide some other contribution to the public good in order to equal the stature of revenue-raising constituencies in the eyes of lawmakers and the electorate. Successful nonprofit organizations are those that can make a persuasive case for their existence, and for the continued existence of the historic properties in their care, to the people charged with raising and spending public monies.<sup>5</sup>

The threats to rural heritage conservation take many forms and must be addressed by both local historic preservation regulators and property owners. The following chapter provides an illustration of these challenges in Prince George's County, Maryland, a jurisdiction with a relatively strong preservation ordinance that nonetheless faces a crisis of deteriorating rural historic properties.

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and has been largely restored; the Commission acquired Compton Bassett in Upper Marlboro in 2010 and has struggled with repairs to both the ca. 1783 main house and the chapel.

<sup>5</sup> A good example of a nonprofit preservation organization that has successfully protected historic resources against development is the Waterford Foundation in Loudoun County, Virginia. The Foundation, founded in 1943, works closely with the County to preserve the area near Waterford.

## Chapter 3: Preservation Challenges in Prince George’s County

Prince George’s County, Maryland, illustrates the urgency of addressing the internal and external threats to rural historic properties in private ownership. Its landscape and economy dominated by agriculture until the twentieth century, the county is now home to an ever-expanding swath of bedroom communities that have transformed large tracts of farmland and other open space into a mix of low- to medium-density development contiguous with the Washington, D.C., urban area. The rapid growth of Prince George’s County has put significant strain on both its natural and historic resources, the latter of which is protected by a relatively strong preservation ordinance contained in Subtitle 29 of the County Code. As of November 2016, there are 437 designated historic sites in the County that are protected under Subtitle 29. An additional 117 historic resources have been identified that could be designated as historic sites if they are found to meet certain criteria.<sup>6</sup>

Figure 3.1 shows the location of designated historic sites and historic resources in Prince George’s County. As a proxy for the urban-rural divide, the map includes an overlay of the so-called “sewer envelope” outside of which no community water or sewer facilities will be approved. The area shaded pink is roughly coterminous with the “Rural Tier” established in the County’s 2002 General Plan, in which policies are recommended to balance “pressure for residential development and landowners’ equity with the desire to maintain rural environments and character.”<sup>7</sup>

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<sup>6</sup> Maryland-National Capital Park and Planning Commission, Prince George’s County Planning Department, Historic Site database, accessed November 29, 2016.

<sup>7</sup> Maryland-National Capital Park and Planning Commission, Prince George’s County Planning Department, *Approved General Plan*, Upper Marlboro, MD: M-NCPPC, October 2002, p. 5.

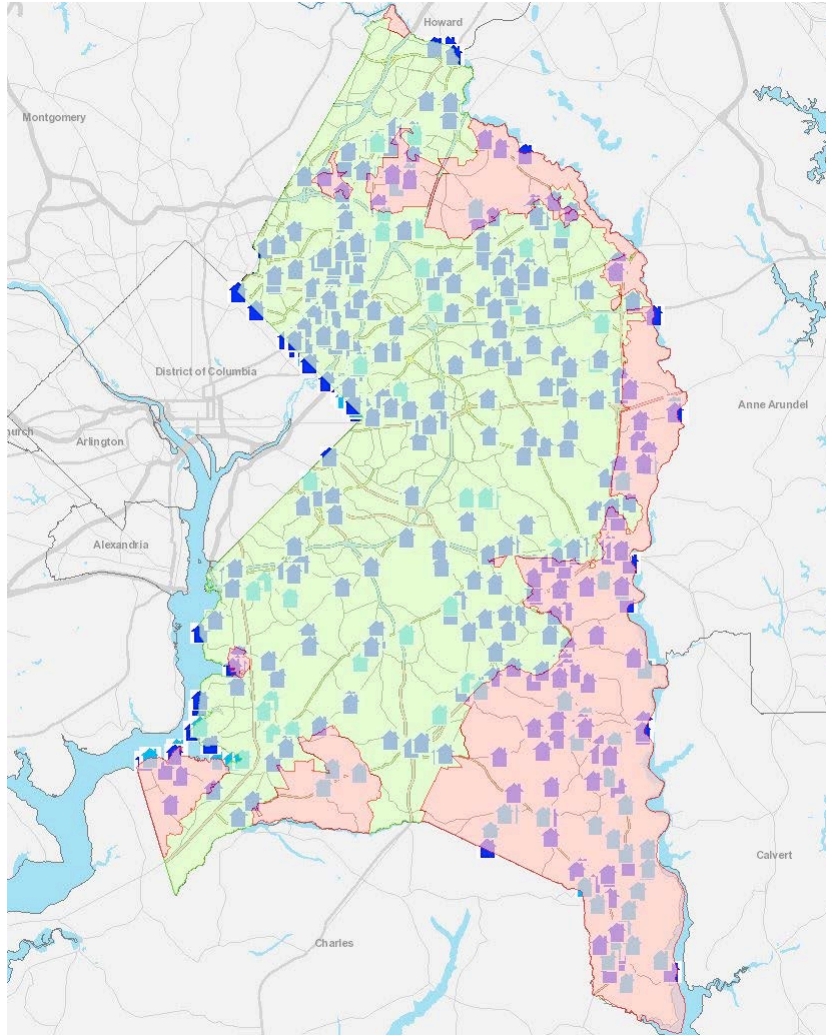


Figure 3.1. Map of Prince George’s County designated historic sites and unclassified historic resources, with “sewer envelope” shaded green, November 2016. Source: [www.pgatlas.com](http://www.pgatlas.com).

The competing priorities of economic development and historic preservation in Prince George’s County create tensions that are not atypical in fast-growing suburban jurisdictions, with historic sites threatened both by new development in rural areas of the county and redevelopment in its urban parts. The images below provide clear evidence of this threat. Figure 3.2 shows a 2016 aerial photo of an area near the town of Clinton, with the location of three designated historic sites and one historic resource noted with blue icons. The subdivisions visible in the image date from the 1970s to the 1990s. Figure 3.3 shows the same area with County-approved



plats overlaid in yellow and lots (new and existing) outlined in black. Whether or not all of the subdivisions are eventually built out, it is clear that both developers and planners foresee major changes in this still relatively rural area.

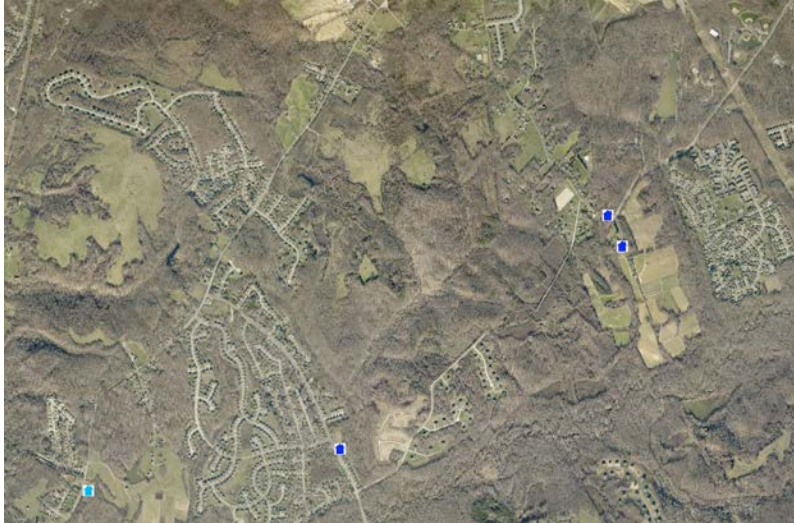


Figure 3.2. Aerial photo of Clinton vicinity, 2016. Source: [www.pgatlas.com](http://www.pgatlas.com).

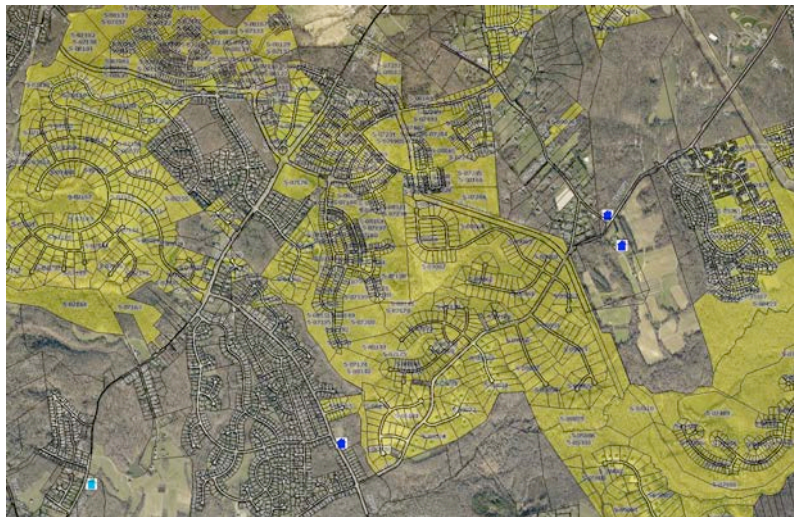


Figure 3.3. Aerial photo of Clinton vicinity with approved plats and lot lines, November 29, 2016. Source: [www.pgatlas.com](http://www.pgatlas.com).

The impact on the physical setting of a rural historic site resulting from new development is illustrated clearly in Figure 3.4, which shows the area surrounding the circa-1840 Perrywood house (marked with a blue icon) in 1984 and in 2016. That the

structure remains standing is a testament to the strength of the Prince George’s County historic preservation regime under Subtitle 29. That it exists in such a radically altered context is a testament to the forces that compete with preservation even in jurisdictions with strong preservation ordinances.

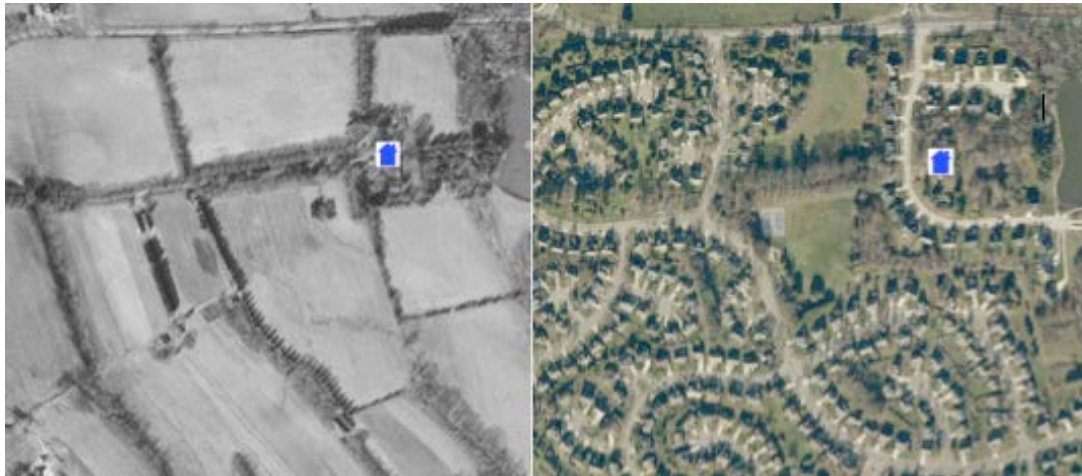


Figure 3.4. Aerial photos of Perrywood vicinity, 1984 and 2016. Source: [www.pgatlas.com](http://www.pgatlas.com).

The Prince George’s County Historic Preservation Commission is responsible for enforcing Subtitle 29, which empowers it to designate historic sites, issue historic area work permits, and approve new development near historic sites, among other actions. The Commission is staffed by the Historic Preservation Section of the County’s Planning Department, which is housed within the Maryland-National Capital Park and Planning Commission.<sup>8</sup>

Among its responsibilities, the staff assists the Commission in maintaining a list of “Properties of Concern (POC),” a classification that denotes a substantial level of degradation of an historic site due to the failure on the part of the owner to perform the work required to keep the property in good repair. Properties may be considered

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<sup>8</sup> “Historic Preservation,” Prince George’s County Planning Department, [www.pgplanning.org/About-Planning/Our\\_Divisions/Countywide\\_Planning/Historic\\_Preservation.htm](http://www.pgplanning.org/About-Planning/Our_Divisions/Countywide_Planning/Historic_Preservation.htm).

for this classification on the basis of field reconnaissance by staff, or by referral from neighbors or other interested stakeholders. While not explicitly required under Subtitle 29, the Commission's POC designation serves as a useful intermediate step before the more formal process of citing properties for Demolition by Neglect. Owners are notified in writing and provided an opportunity to take corrective action before the HPC makes a POC determination; once a property is listed as such, action must be taken by the owner to remove it from the list and continued failure to do so exposes the property to a finding of Demolition by Neglect. It is in the interest of both the HPC and the property owner to avoid such a finding, as it can consume a large amount of Commission time and could result in a tax lien imposed on the owner.<sup>9</sup>

The Properties of Concern classification also provides a quantifiable, if inexact, measure of the problems facing privately owned historic properties in Prince George's County. Over twenty properties are currently listed as POC; these include properties in both private and public ownership, located in both urban and rural contexts, containing structures large and small, with a broad representation of both style and vintage. Several of the properties are listed on the National Register of Historic Places. The evidence suggests that no property, regardless of architectural or historical significance, is immune to the risk of deterioration if not maintained.

The Commission's POC list represents only a small fraction of a larger population of properties identified by Historic Preservation staff as abandoned, vacant or underutilized. Most of the 26 properties identified as abandoned are in poor condition or only remain as ruins; the 40 vacant properties are in mostly poor to fair condition, while most of the 16 underutilized properties are in fair or good condition.

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<sup>9</sup> Prince George's County Code, Subtitle 29, Section 116(c), accessed at [www.municode.com](http://www.municode.com)

While many of these 82 properties are unlikely to be designated as POC, they merit regular surveillance by staff because their lack of consistent occupation puts them in greater danger of deterioration. Importantly, the properties noted above represent only the known universe of at-risk historic sites in Prince George’s County. The total number of properties confronting some type of preservation issue almost certainly extends far beyond any official list maintained by the County.

Rural preservation is of particular concern in Prince George’s County, where some of the oldest designated historic sites are located in rural areas. These sites are by virtue of their age particularly vulnerable to the deleterious effects of neglect, and by virtue of their location less likely to attract the kind of public scrutiny that might compel a response by either the HPC or a property owner. Several sites designated as Properties of Concern or otherwise identified as abandoned, vacant, or underutilized are located in rural areas, although they do not constitute a majority of such sites.

Table 3.1 presents summary data for the 82 designated historic sites that have been identified as abandoned, vacant, or underutilized, showing the number of properties in each category classified as being in good, fair, poor, or ruinous condition. Properties of Concern are included among these 82 sites.

Table 3.1. Summary data for abandoned, vacant, and underutilized historic sites, as of November 2016

	Good	Fair	Poor	Ruins	<b>Total</b>
Abandoned	0	2	22	2	<b>26</b>
Vacant	11	15	14	0	<b>40</b>
Underutilized	9	6	1	0	<b>16</b>
<b>Total</b>	<b>20</b>	<b>23</b>	<b>37</b>	<b>2</b>	<b>82</b>

Source: Prince George’s County Planning Department, Historic Preservation Section.

Figure 3.5 shows the distribution of abandoned, vacant, or underutilized historic sites across the Planning Areas of Prince George’s County. The large number (10) in the vicinity of Upper Marlboro is noteworthy; the area is relatively rural, has a high concentration of historic sites, and is home to the Historic Preservation Section’s base of operations in the County Administration Building. Any correlation between these factors is speculative, but it could support the theory that rural sites are more prone to be abandoned, vacant, or underutilized, or alternatively, that sites within close reach of regulators are more likely to be identified as such.

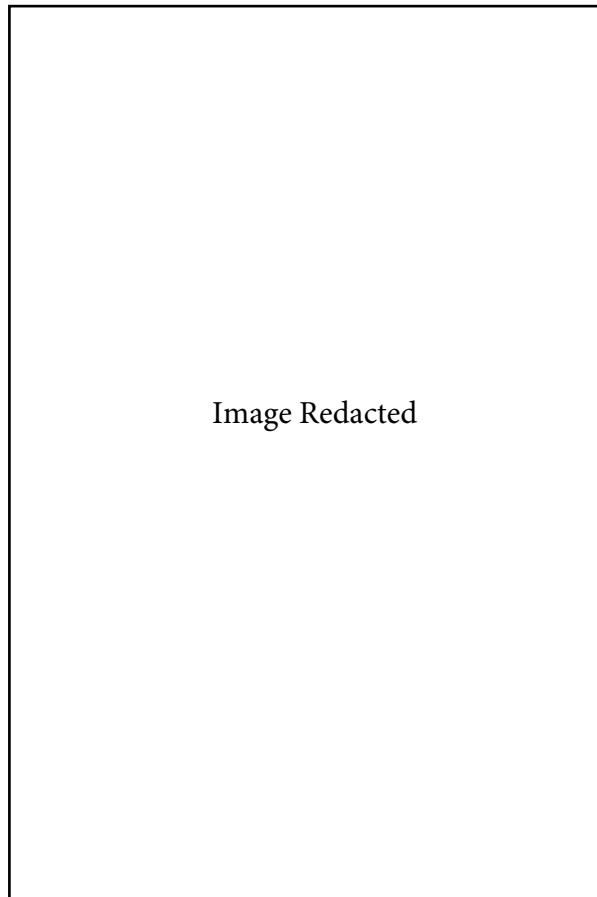


Figure 3.5. Distribution of designated historic sites identified as abandoned, underutilized, or vacant by Prince George’s County Planning Area. Source: Historic Preservation Staff data, accessed November 29, 2016.

Another imperfect measure of the rural preservation challenge is the extent to which private owners have taken advantage of the County's Historic Property Grant Program. Grants are typically awarded for discrete restoration projects, often only cover a portion of the total project cost, and are paid out after the work is completed. The main condition attached to receipt of a grant is the conveyance of a preservation easement on the property's exterior, which is subject to regular inspection by the Historic Preservation Section staff. The property owner may be eligible to deduct the value of the easement from their federal income tax, although the grant award itself is likely to be the more valuable incentive for participating in the grant program.

Representative projects at rural sites for which grants have been awarded since 2009 include: \$27,000 for the restoration of nine windows on a 1798 brick plantation house; \$20,000 to partially fund cedar shingle replacement on an 1844 farmhouse; \$52,000 to restore the German siding on a circa-1850 former rectory; and \$11,000 to restore the chimneys on an 1880 frame house. One of the case study properties discussed in this paper, Villa de Sales, received a \$25,000 grant for the rehabilitation of its Victorian stable; the total project cost was estimated at \$138,000. Several properties have made repeated use of the grant program, including a circa-1840 Greek Revival dwelling for which a total of \$111,000 has been awarded since 2010 for a full restoration (the total project cost is unknown).<sup>10</sup> Again, the figures cited here serve only to illustrate the magnitude of the financial burdens faced by rural historic property owners. Given the limited availability of grants and other incentives, owners will remain responsible for funding most of their costs.

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<sup>10</sup> "Historic Property Grant Program," M-NCPPC, Prince George's County Planning Department, Historic Preservation Section, [http://www.pgplanning.org/About-Planning/Our\\_Divisions/Countywide\\_Planning/Historic\\_Preservation/Grants\\_and\\_Tax\\_Credits.htm](http://www.pgplanning.org/About-Planning/Our_Divisions/Countywide_Planning/Historic_Preservation/Grants_and_Tax_Credits.htm)

As is true in the field of preservation generally, in recent years Prince George's County (and neighboring Montgomery County) has undertaken a concerted effort to document more recent sites of architectural merit. These include primarily twentieth-century buildings that are associated with the outward expansion of the Washington, D.C., metropolitan area, and as such are located mostly in urban or suburban contexts. These buildings are less visible to the untrained eye than a Georgian or Federal-style house surrounded by farmland but are no less worthy of preservation in the long-term public interest. This issue is outside the scope of this paper, but it is helpful to put the challenges of preserving rural historic sites in the broader context of Prince George's County's expanding preservation priorities.

There is strong evidence to suggest that the most time-sensitive preservation issue confronting Prince George's County is the retention and continued maintenance of its rural historic properties. These sites are among the oldest standing structures in the county and are especially vulnerable to the effects of time, while their physical contexts are more vulnerable to radical alteration through new development. The Historic Preservation Commission and its staff should address rural preservation with urgency, including by working with property owners to ensure they have access to resources that will assist them in their stewardship responsibilities.

## Chapter 4: Literature Review

### *Academic Treatment*

American preservation literature relevant to the subject of reuse feasibility at rural historic properties falls into one of two categories: sources that deal with rural heritage conservation writ large and those concerned with theories and applications of preservation economics. A broad range of materials, including scholarly articles, preservation texts, and nonprofit publications were reviewed for this paper. None were found that focus solely, or even substantively, on reuse feasibility for privately owned rural historic properties. Even the most germane sources are of varying usefulness and most were published in the 1970s or early 1980s.

*Preserving Large Estates*, published by the National Trust for Historic Preservation in 1982, comes closest to providing the type of information on reuse feasibility that would be useful to the target audience of this paper. Author Christopher Closs begins the volume by outlining a variety of reuse options for large historic properties, within the broad categories of corporate/residential/for profit, educational/recreational/community, and house museum. Closs calls for gathering comprehensive information on both the buildings and the grounds as a first step in reuse planning, including: location; accessibility; proximity to public facilities; available acreage; physical character of the property (woodland, agricultural, etc.); visual quality; adjacent land uses; floor area of structures and number of stories; restrictions on density and lot coverage; interior traffic circulation; and



historical/architectural/archaeological significance.<sup>11</sup> Subsequent steps include the development of detailed drawings and site plans to illustrate the proposed reuse plan, as well as a funding strategy. Closs maintains that the most important aspects of conserving large estates are physical maintenance and budget planning.<sup>12</sup>

Several case studies are described, the most relevant being Shelburne Farms in Vermont. Facing the sale and redevelopment of some of the estate's acreage by the owner, younger family members successfully lobbied for adaptive reuse as an alternative. This included repurposing the 100-room main house for cultural programming, the coach barn for education, and the 1887 farm barn for agriculture-related businesses that reflected the region's rural economy. A consultant was hired to develop a five-year business plan to make the property self-sustaining by leveraging its real estate and agricultural assets. In addition to adaptive reuse, the plan called for actively managing the property's woodlands as an additional source of revenue.<sup>13</sup>

While the reuse planning process outlined and illustrated by Closs offers some useful insights, private owners of rural historic properties may lack either the financial resources to hire professional consultants or the diversity of reuse options possible at Shelburne Farms.

Published by the Society for the Preservation of Long Island Antiquities in 1977, *Saving Large Estates: Conservation, Historic Preservation, Adaptive Re-use* is focused primarily on reuse options for properties of much greater size and architectural significance than the average rural historic site—more in line with the

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<sup>11</sup> Christopher W. Closs, *Preserving Large Estates*, Washington: National Trust for Historic Preservation, 1982, 7.

<sup>12</sup> Closs, *Preserving Large Estates*, 10.

<sup>13</sup> *Ibid.*, 13-14.

large “country houses” that dot the landscape of Great Britain. Some relevant insights can be extracted, however. In one chapter, co-authors William Shopsin and Elizabeth G. Miller offer the general thesis that “in order for buildings and their grounds to survive, they must in some way ‘earn their own living.’”<sup>14</sup> They observe that “what has been lacking is a concept of real estate management that can meet the challenge with a team of professionals who could evaluate, plan, develop and manage the future” of large estates.” This team, they add, could be hired by a property owner to appraise the land, the main residence and any auxiliary structures, investigate available reuse alternatives, and develop a financial plan to carry out the selected alternative.<sup>15</sup> Shopsin and Miller elaborate further on the first step in the reuse planning process, calling for a professional evaluation of a property’s historical and architectural significance, including its structures, furnishings, and landscape, to inform decisions on what buildings should be added, adapted, or replaced.<sup>16</sup> As with Closs, the prescriptions of Shopsin and Miller are unlikely to help the average cash-strapped historic property owner, unless they can find a way to replicate the planning process they suggest without relying on professional assistance.

The bulk of the available literature on rural heritage conservation considers the issue from the perspective of large area planning rather than protecting individual properties. An example of this treatment is found in *Saving America's Countryside: A Guide to Rural Conservation*, by Samuel N. Stokes, A. Elizabeth Watson and Shelley S. Mastran. The volume contains a wealth of information of use to planners,

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<sup>14</sup> William C. Shopsin and Grania Bolton Marcus, ed., *Saving Large Estates: Conservation, Historic Preservation, Adaptive Re-use*, Setauket, NY: Society for the Preservation of Long Island Antiquities, 1977, 10.

<sup>15</sup> *Ibid.*, 9.

<sup>16</sup> *Ibid.*, 32.

advocates, and community officials, including descriptions and case study examples of transfer of development rights (TDR), community-supported agriculture, conservation easements, and land preservation funds. These programs may all support the preservation of private historic properties, but they are examples of top-down preservation rather than solutions that owners can develop and use on their own sites. Importantly from the perspective of this project, several of the examples are from Maryland, including Montgomery County's TDR program and the Maryland Agricultural Land Preservation Foundation (MALPF) easement program. *Saving America's Countryside* offers some broad observations that help make the case for rural heritage conservation, such as by noting that farmland and open space, while bringing in relatively little tax revenue, cost even less in service provision and thus are a net financial positive for local governments.<sup>17</sup> To this statement could be added the argument, central to this paper, that income-producing rural historic properties would further support the local tax base while requiring little additional outlay of public funds.

Preservation economics literature is similarly concentrated on top-down approaches to rural heritage conservation. Donovan Rypkema, widely regarded as the leading scholar and practitioner in the field, addresses the economic benefits of preservation to rural areas in *The Economics of Historic Preservation: A Community Leader's Guide*. Here again, the private historic property owner is largely absent from the discussion. Rypkema devotes a chapter to the subject of heritage tourism, discussing its benefits to communities both urban and rural. He cites statistics on the

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<sup>17</sup> Samuel N. Stokes, A. Elizabeth Watson and Shelley S. Mastran, *Saving America's Countryside: A Guide to Rural Conservation*, 2nd ed., Baltimore: JHU Press, 1997, 13.

growth of rural tourism, reflecting what one study on the American South called a “nostalgic rediscovery of America’s small towns and countryside as preferred vacation destinations.”<sup>18</sup> Rypkema concludes that “individual historic properties have substantial economic impact”<sup>19</sup> and that “investment in historic resources...[is] critical to successful cultural tourism,”<sup>20</sup> but he fails to connect these two arguments with a call to help property owners plan for and make the investments necessary to preserve their sites as historical and cultural assets.

Robert Stipe’s edited volume, *A Richer Heritage: Historic Preservation in the Twenty-First Century*, provides perhaps the greatest barometer of the modern preservation movement’s concern for rural historic properties. Once again, the limited academic treatment seems at odds with the scale of the problem as observed in the real world. The book laments that rising land values and the economic vagaries of agriculture have led owners and their heirs to discount their sentimental attachment or sense of obligation to a property and sell off all or part of their acreage in order to satisfy tax obligations or simply for financial gain.<sup>21</sup> It also notes that the historic farmhouse clusters that once characterized many rural landscapes have been sacrificed in favor of new buildings and larger assemblages of land for modern agricultural operations.<sup>22</sup>

Examples are provided of top-down rural preservation programs, such as the Conservation Trust for North Carolina, which protects historic farm buildings and

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<sup>18</sup> Donovan Rypkema, *The Economics of Historic Preservation: A Community Leader’s Guide*, Washington: National Trust for Historic Preservation, 1994, 83.

<sup>19</sup> *Ibid.*, 84.

<sup>20</sup> *Ibid.*, 82.

<sup>21</sup> Genevieve P. Keller and J. Timothy Keller, “Preserving Important Landscapes,” in Robert E. Stipe, ed., *A Richer Heritage: Historic Preservation in the Twenty-First Century*, Kindle ed., Chapel Hill: University of North Carolina Press, 2003.

<sup>22</sup> *Ibid.*

landscapes from the threat of development,<sup>23</sup> and Preservation North Carolina's use of easements and covenants to protect eighteenth- and nineteenth-century rural properties.<sup>24</sup> Passing reference is also made to the Centennial Farm programs that several state historic preservation offices have established to encourage the preservation of historic farmsteads, and it should be noted that one of the case studies to be discussed in this paper, Villa de Sales, is one of four sites in Maryland to have the rarer distinction of being designated as a Bicentennial Farm—that is, a farm owned and operated by the same family for at least 200 years. What is lacking in *A Richer Heritage* is any convincing evidence that, at least at the time the book was published in 2003, the preservation movement had thought seriously about how to help rural historic property owners determine what forms of onsite income production are most appropriate to their situation.

More recent sources do little to challenge the generalization that rural heritage conservation is typically seen from a top-down perspective. A 2005 document that summarizes the National Trust for Historic Preservation's rural programs highlights a range of efforts undertaken across the organization, nearly all of which focus on working with state and local governments and nonprofit groups rather than providing direct assistance to property owners. These include cultural heritage tourism planning workshops, design guidance for rural communities, and commercial district

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<sup>23</sup> Keller and Keller, "Preserving Important Landscapes,"

<sup>24</sup> J. Myrick Howard, "Nonprofits in the American Preservation Movement," in Stipe, ed., *A Richer Heritage*.

revitalization through the National Main Street Center. Only one program, BARN AGAIN!, is aimed at providing technical assistance to property owners.<sup>25</sup>

Likewise, a short volume published by the National Trust for Historic Preservation published in 2011, *Heritage-Based Rural Development: Principles, Strategies, and Steps*, is clearly aimed at local officials rather than property owners. Author James Lindberg calls on readers to “use a regional approach” to heritage-based rural development, while advising them to “nurture grassroots involvement” and “encourage entrepreneurship”—suggesting that property owners do have a role to play but that it is up to government agencies to work out the particulars.<sup>26</sup>

One area of rural heritage conservation where preservation organizations have shown a sustained interest in helping property owners is barn preservation. One of the most recognizable features of any agricultural landscape, barns have been at the heart of advocacy efforts that began with the National Trust for Historic Preservation’s BARN AGAIN! program in the late 1980s and continue through a nationwide network of barn-related groups. The National Barn Alliance, formed in the mid-1990s, coordinates the activities of this network and provides information on technical resources and financial incentives for barn restoration. The NBA web site provides links to publications that focus on barn rehabilitation and adaptation, which could prove valuable to rural historic property owners that have such structures on

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<sup>25</sup> “Background on National Trust Rural Heritage Development Programs and Resources,” Washington: National Trust for Historic Preservation, 2005.

<sup>26</sup> James Lindberg, *Heritage-Based Rural Development: Principles, Strategies, and Steps*, Washington: National Trust for Historic Preservation, 2011.

their land.<sup>27</sup> The site also provides information on state-level barn preservation programs, such as the Maryland Tobacco Barn Restoration Fund.<sup>28</sup>

There are contemporary case studies of rural historic properties that are not only self-sustaining but quite profitable, although the best-known examples are so exceptional in their characteristics that they relate only tenuously to the type of property, and property owner, for whom this paper is intended. One such site is the Biltmore Estate near Asheville, North Carolina, which was first opened to the public in 1930 and has operated profitably as a heritage attraction since the 1960s.<sup>29</sup> John Francis Amherst Cecil assumed ownership of Biltmore after marrying Cornelia Vanderbilt in the 1920s and was the first to welcome visitors, but it was Cecil's son, William, who expanded the income-producing uses of the property beyond the traditional house museum model. William Cecil planted vineyards in 1971 and established the Biltmore Estate Wine Company, which by 2016 produced 150,000 cases of wine annually and has grown to become the most visited winery in the United States.<sup>30</sup> The property also boasts a 210-room luxury inn and a more moderately-priced hotel, along with diverse attractions that include a living history farm at the site's recently constructed Antler Hill Village, extensive formal and informal gardens, and of course, the nearly 180,000 square foot main house. In 2012, the parent company of the Biltmore Estate reported over 1 million visitors and total revenue of over \$134 million. The majority of the revenue came from the estate itself,

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<sup>27</sup> "Resources," National Barn Alliance, accessed December 4, 2016, [barnalliance.org/resources/](http://barnalliance.org/resources/).

<sup>28</sup> The program began in 2004 and ended in 2010 after funding was terminated. See "Saving and Reusing Historic Barns in Maryland," Preservation Maryland, November 1, 2015, [preservationmaryland.org/tobacco-barns/](http://preservationmaryland.org/tobacco-barns/)

<sup>29</sup> "Historic Preservation Master Plan for Asheville and Buncombe County, Preliminary Final Draft, Asheville, NC: Asheville-Buncombe County Historic Resources Commission, 2014, 17.

<sup>30</sup> "Our Story," The Biltmore Company, 2016, [www.biltmore.com/wine/wine-story](http://www.biltmore.com/wine/wine-story).

including the winery and inn, with smaller amounts from subsidiaries that market Biltmore-inspired products and furnishings. Total expenditures across the Biltmore Companies were just over \$128 million in 2012.<sup>31</sup>

Considering the example of Biltmore in the context of this literature review shows that pertinent contemporary information related to rural historic property reuse is more likely to come from actual sites than from academic sources. The Biltmore case demonstrates that rural properties can be operated profitably through a diverse and well-managed program of reuse. At the same time, the owners of Biltmore have at their disposal the largest privately owned house in the nation, situated on 8,000 acres, boasting iconic architecture, Frederick Law Olmsted-designed landscapes, and historical associations with one of the preeminent families of the Gilded Age. No other rural historic property in the country possesses a comparable array of attributes. Biltmore might provide inspiration but is of dubious precedential value.

### ***The British “Country House” Experience***

The plight—and promise—of privately owned rural historic properties in the United States finds a precedent in the experience of the “country house” in Great Britain. As in the American version, the British story centers on homes and landholdings that incur expenses that far exceed the means of their owners. Those that still produce income, as all the great estates once did, have seen their returns diminish due to larger economic and cultural changes. Needs that cannot be met by a property’s earnings must instead draw on the owner’s capital or some other source of

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<sup>31</sup> Michael H. Shuman, Heather Burns, and Doug Hammond, *The Biltmore Companies 2012 Economic Study: Measuring Local Impact*, South Deerfield, MA: Burns & Hammond, 2013, p. 5-6.



support. In this sense, the parallels between rural properties on both sides of the Atlantic are striking.

Important differences between conditions in Britain and America must also be noted. First is the vastly larger size of the “country house”—as it is defined in British culture and academic literature—as compared with the typical rural historic home in the United States. The country seats of the British aristocracy reflected their owners’ stature as the social and political leaders of the nation, and by extension, the Empire. The durability of the class system and division of wealth is made manifest in the architecture of the British country house from at least the Elizabethan period through the late Victorian, including the additions and embellishments of successive generations. The interiors of these great homes served as repositories for exquisite furniture and priceless works of art, while the vast acreage that surrounded them provided the means to support both the estate and the local community.<sup>32</sup>

Most historic homes in rural America, even those executed in high style and decorated in like fashion, cannot compare with the castles and mansions that once dominated the British countryside. Their original owners did not share the status of their British counterparts because the American colonies-turned-states had neither the same system of government nor the economic history of their onetime ruler. Simply put, there was not enough time to develop a resilient landed gentry in the United States before industrialization shifted the nation away from its agrarian roots. The relative modesty of even those homes built by the wealthy planter class of the

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<sup>32</sup> Martin Wainright describes the relationship between the country house squire and the residents of surrounding villages as a “social contract” roots in the Roman era of British History. See Martin Wainright, *The English Village: History and Traditions*, London: Michael O’Mara Book, 2011, n.p.

eighteenth and nineteenth centuries is a key distinction when comparing the British and American experience with rural historic properties.

The large size and financial requirements of ailing country houses in Great Britain have informed both how the issue is framed and what remedies have been proposed over the past century. Peter Mandler's 1997 work *The Fall and Rise of the Stately Home* provides the definitive account on the subject. During the first half of the twentieth century, which saw a quickening in the decline of estates throughout the country, political leaders and property owners debated amongst themselves and with each other over the proper role of the government in rural preservation. The extent to which public funds should be committed to rescuing private property was at the core of questions articulated in the early 1930s by Philip Kerr, 11<sup>th</sup> Marquess of Lothian, when forced to deal with his own newly inherited estates. Were these disused houses a personal or a social problem? Was there some public benefit to their continued survival? If so, how could they be preserved and used?

The forum for debating these questions would become the National Trust, which in the years before World War II was led by landlords, Liberal politicians, and others who wanted to push the body beyond its earlier focus on discrete buildings and sites to take a more active role in the burgeoning national exercise of countryside planning.<sup>33</sup> Lord Lothian pressed his friends in the Trust to propose tax reliefs that would benefit country house owners, an idea dismissed by Neville Chamberlain, then the Chancellor of the Exchequer. Estate taxes, often referred to as "death duties," represented a significant drain on funds that might otherwise be used for the upkeep

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<sup>33</sup> Peter Mandler, *The Fall and Rise of the Stately Home*, New Haven: Yale University Press, 1997, 296.

of a large country house. First introduced in 1894 at the rate of eight percent, death duties had risen to 50 percent by the time Chamberlain considered the issue in the 1930s.<sup>34</sup> The rate climbed to 75 percent in 1945, a burden that many large estate owners could only manage by selling land or other assets.<sup>35</sup>

The government also had little interest in acquiring historic properties, to the chagrin of Lothian and other owners. Acting on two proposals that Chamberlain put forth to help the National Trust address the issue while avoiding additional government entanglement, the Trust in 1936 adopted a Country House Scheme by which the organization would take on properties whose owners could provide a large endowment for their upkeep, with the owners and his heirs remaining as tenants in perpetuity.<sup>36</sup>

Mandler notes that the Country House Scheme, and its underlying premise that country houses were worthy of protection as part of Britain's national heritage, faced resistance from both the nation's taxpayers and property owners themselves.<sup>37</sup> Chamberlain appears to have been speaking for the first group when he voiced resistance to tax reliefs; owners, meanwhile, had been skeptical of government intervention since the nascent countryside planning movement had proposed radical changes in how rural areas were to be developed. Fortunately for them, one byproduct of World War II in Britain was a renewed interest in preserving traditional agricultural landscapes. Coupled with what Mandler sees as a new idealization of the city, this constituted a marriage of rural preservation and new urbanism that would

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<sup>34</sup> Mandler, *The Fall and Rise of the Stately Home*, 272.

<sup>35</sup> *Ibid.*, 334.

<sup>36</sup> *Ibid.*, 304.

<sup>37</sup> *Ibid.*, 293.

later be transplanted to the United States and is a useful context for this paper's discussion of the sustainability of rural historic properties.

At the same time, British country house owners came to realize that a more publicly relevant purpose for their properties was necessary in order to ensure their preservation. This led to explorations of alternative reuse and debates about what uses and alterations were appropriate, questions that remain central to efforts to preserve historic buildings on both sides of the Atlantic. The key difference in Britain is the much larger size of the house involved, which raises the financial bar for preservation and made some form of external support—either from the government or the National Trust—a prerequisite for success. The typical rural historic site in the United States, by contrast, can at least conceivably be maintained with the resources available to a private owner.

As it turned out, the fate of country houses in Britain remained linked with the fortunes of their owners notwithstanding the passage of sympathetic legislation, including the Town and Country Planning Act of 1947, or help from the National Trust through its Country House Scheme. Beginning in the late 1940s and continuing through the early 1960s, the nation saw a striking number of its country houses demolished—at least 204 in the peak period from 1950 to 1955.<sup>38</sup> Many others were sold and put to new use as schools, hospitals, and other institutions. When land values increased in the 1950s and 1960s as a result of the Conservative government's denationalization of development rights, the landed gentry refilled its collective coffers by selling off portions of their estates. The crisis would again resurface with a rise in populist sentiment and dwindling sympathy for aristocratic woes beginning in

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<sup>38</sup> Mandler, *The Fall and Rise of the Stately Home*, 326.

the late 1960s. Mandler's summation of the British country house experience through the mid-1970s supports this paper's contention that owner-centered strategies for rural preservation are a critical complement to top-down, government-led approaches; he concludes that "the health of country houses depended rather more on private wealth than public enthusiasm."<sup>39</sup>

The state of British country house preservation at a particularly critical period is chronicled in John Cornforth's 1974 report, *Country Houses in Britain: Can They Survive?* Commissioned by the British Tourist Authority, the report opens with a straightforward stock-taking: out of 950 country houses that Cornforth considered "notable," about 430 were privately owned and not open, the majority being in reasonable condition; about 152 were privately owned and regularly open to the public; about 95 belonged to the National Trust and the National Trust for Scotland; about 40 belonged to the Department of the Environment and local authorities, with most open as show places; and about 225 had been adapted for other uses. Since World War II, Cornforth estimated that 270 "notable" houses had been demolished in England and Wales and 70 in Scotland; of the English losses, only four had been demolished since 1964. At least 50 notable houses had lost all or most of their contents and had been adapted for institutional use.<sup>40</sup> Cornforth is particularly interested in developments since the establishment of the Historic Building Councils in England, Scotland, and Wales through the Historic Buildings and Ancient Monuments Act of 1953. He notes that while national preservation policy during the interim had become increasingly concerned with physical contexts rather than

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<sup>39</sup> Mandler, *The Fall and Rise of the Stately Home*, 355.

<sup>40</sup> John Cornforth, *Country Houses in Britain, Can They Survive?*, London: Country Life for the British Tourist Authority, 1974, 4.

structures alone, the focus was primarily on urban areas. He also argues that “political reasons” had kept the government from fully engaging with issues related to country houses—presumably a reference to the powerful and connected men who continued to own many of them.<sup>41</sup>

Cornforth recounts in great detail the various government policies that impacted country house preservation—estate tax provisions in successive Finance Acts, for instance, or the 1968 Town and Country Planning Act—but spends little time discussing how property owners themselves approached the issue. In fact, Cornforth appears to put little faith in the stewardship abilities of private owners, particularly new owners, for whom he says country houses were mostly an “expensive hobby.” He offers a word of warning that, although directed at a British audience in the 1970s, is aimed squarely at the challenges addressed in this paper: “It is always said that it takes money to make money, and, where country houses are concerned, it seems it takes more to make less; and anyone who embarks on a country house hoping for the reverse is more than likely to have an unpleasant shock.”<sup>42</sup> Cornforth does offer some advice on encouraging greater visitation, such as providing amenities aimed at children, but cautions that increasing public access could expose a property to additional costs and taxation.<sup>43</sup> He adds the gloomy prediction that owners will increasingly be forced to sell off land to cover capital gains taxes and death duties, with the remaining estate insufficient to cover a fraction of ongoing costs.<sup>44</sup>

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<sup>41</sup> Cornforth, *Country Houses in Britain, Can They Survive?*, 4.

<sup>42</sup> *Ibid.*, 64.

<sup>43</sup> *Ibid.*, 87.

<sup>44</sup> *Ibid.*, 75.

Rural heritage conservation remains a challenge in Great Britain, whether it involves modest farm buildings or the grand country houses discussed by Mandler and Cornforth. In a 2005 report commissioned by Historic England and the British Countryside Agency, it was estimated that repairing all historic farm structures classified as being in “immediate risk” would cost over \$1.3 billion. An additional data point highlighted in the report, which echoes the situation in Prince George’s County as described in Chapter 3, is that 57 percent of properties with listed historic farm structures had been subject to development applications since 1980, 80 percent of which were approved.<sup>45</sup> In their 2016 “Heritage at Risk” report, Historic England estimated that 43 of the 122 country houses on their Heritage at Risk Register had a total “conservation deficit” of roughly \$150 million.<sup>46</sup> The report cites shortages of skilled labor and scaffolding as contributing to increased conservation costs.<sup>47</sup>

Compared with the United States, however, national support for preserving historic sites in general, and rural properties in particular, has remained robust among government agencies and nonprofit organizations. As the public entity charged with designating and protecting historic sites of all types, Historic England fulfills a similar but broader role as the U.S. National Park Service. Whereas listing on the National Register of Historic Places extends almost no protection to private properties in the United States, sites on the National Heritage List for England must receive

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<sup>45</sup> Peter Gaskell and Stephen Owen, *Historic Farm Buildings: Constructing the Evidence Base*, London: English Heritage and the Countryside Agency, 2005, p. 53.

<sup>46</sup> A site’s conservation deficit is defined as the existing value of the historic building, plus necessary capital project costs, minus the building’s post-project value.

<sup>47</sup> “Heritage at Risk: Latest Findings,” Historic England, accessed December 3, 2016, <https://historicengland.org.uk/advice/heritage-at-risk/findings/>.

consent for alterations, additions, demolition, and for new buildings—requirements typically administered only at the local level in the United States.<sup>48</sup>

Recent publications related to rural heritage conservation in Great Britain, including resources aimed at property owners, are abundant and easy to locate. A particularly useful document is the “Farmstead Assessment Framework” published by Historic England in 2015. The framework guides users through a four-stage process that considers physical site attributes, heritage significance, capacity for changes to the site and its uses, and siting and design issues.<sup>49</sup> Among preservation nonprofits, the Heritage Alliance has demonstrated special concern for farmsteads. The organization’s Rural Heritage and Spatial Planning advocacy groups held a workshop in November 2014 to discuss the future of historic farm buildings. One presentation highlighted the availability of “Heritage Enterprise” funding, appropriated from the National Heritage Lottery Fund, which can be used to pay for rehabilitation costs that support new onsite businesses on historic sites.<sup>50</sup>

As with Biltmore in the United States, there are large country houses in Great Britain that provide an idealized model of rural historic property reuse. Chatsworth House in Derbyshire, the seat of the Duke of Devonshire, has been open to the public since the mid-nineteenth century and has long boasted high rates of visitation, from 80,000 in one season at the turn of the twentieth century to 622,191 in 2015.<sup>51,52</sup>

Chatsworth offers a diverse range of programming, including tours of the 283-room

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<sup>48</sup> “Listed Building Consent,” Historic England, accessed December 3, 2016, <https://historicengland.org.uk/advice/planning/consents/lbc/>

<sup>49</sup> Historic England, *Farmstead Assessment Framework: Informing Sustainable Development and the Conservation of Traditional Farmsteads*, London: Historic England, 2015.

<sup>50</sup> Ben Greener, “Heritage Lottery Fund,” presentation at The Future of Traditional Farm Buildings workshop, The Heritage Alliance, Heron’s Ghyll, East Sussex, England, November 10, 2014.

<sup>51</sup> Mandler, *The Fall and Rise of the Stately Home*, p. 93

<sup>52</sup> *Chatsworth House Trust, Annual Report 2015*, Chatsworth House Trust, 2015, p. 4.



house and formal gardens, a regular slate of educational talks and workshops, and special events such as a Christmas masquerade ball and a summer literary festival. The house also provides research internships to students of the University of Sheffield School of Arts and Humanities.<sup>53</sup>

Chatsworth House is owned by the Trustees of the Chatsworth Settlement, established in 1946, and has been under the stewardship of the Chatsworth House Trust charitable organization since 1981. In 2015, the Trust reported annual income of about \$15.9 million, with visitation accounting for roughly 70 percent, sponsorship, grants and donations comprising 11 percent, and smaller shares from investment income, concessions, and membership fees for the Friends of Chatsworth. Expenditures for the year totaled \$15.2 million, with visitor services, conservation and restoration, and spending related to the site's 10-year master plan accounting for 50 percent of the total and stewardship costs accounting for 44 percent.<sup>54</sup> Although Chatsworth operates at a profit, the current Duke of Devonshire has resorted to a source of funding familiar both to his family and to country house owners in general—sales from the estate's vast art collection. In December 2012, a drawing by Raphael acquired in the 1720s was sold at auction for \$47.8 million.<sup>55</sup> The Duke's father sold art on two occasions, including in 1950 to help pay death duties.<sup>56</sup>

Country houses of the size and splendor of Chatsworth are more common in Great Britain than in the United States, and despite being far removed from the

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<sup>53</sup> *Chatsworth House Trust, Annual Report 2015* and [www.chatsworth.org](http://www.chatsworth.org)

<sup>54</sup> *Chatsworth House Trust, Annual Report 2015*, p. 36-37.

<sup>55</sup> David Ng, "Raphael drawing sells for \$47.8 million at auction," *Los Angeles Times*, December 6, 2012.

<sup>56</sup> "20<sup>th</sup> Century," Chatsworth House Trust, accessed December 4, 2016, [www.chatsworth.org/about-chatsworth/history-of-chatsworth/20th-century](http://www.chatsworth.org/about-chatsworth/history-of-chatsworth/20th-century).

situation of most rural historic properties they offer lessons that may be useful to stewards of more modest sites. The financial reporting provided by estates such as Chatsworth allows a glimpse “under the hood” of a successful operation and could open property owners’ eyes to management issues they had not considered. They might also draw inspiration from the innovative programming at country houses like Goodwood, where the Duke of Richmond oversees an estate that features a hotel, a sustainable restaurant, two golf courses, meeting spaces, a flying school, and other amenities.<sup>57</sup> Goodwood also demonstrates the value of branding a site around a recurring “flagship” event, in this case, an annual motor racing summit that was started in the 1930s and drew 145,398 attendees in 2012.<sup>58</sup>

### ***Existing Guidance for Analyzing Reuse Feasibility***

Examples of reuse feasibility guidance of the type suggested by this paper exist, but are limited in number and generally not oriented toward the needs and possibilities of a privately owned rural historic property. Some materials provide a clear, step-by-step methodology for assessing the potential for onsite income production, but only from a certain class of activities. Others assume that a property owner can hire a consultant or assemble a team of experts to conduct a feasibility study and oversee the implementation of the resulting plan. Still others assume that a site is already operated to produce income but is in need of a change to its business model. As with the preceding literature review, a survey of available reuse feasibility guidance found little of direct relevance to rural historic property owners.

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<sup>57</sup> Goodwood House website, accessed December 4, 2016, [www.goodwood.com](http://www.goodwood.com).

<sup>58</sup> The Federation of British Historic Vehicle Clubs and the University of Brighton, *Economic Impact of the Goodwood Revival on the Surrounding Area*, Suffolk: Lavenham Press, 2013, p. 7.

That being said, some use could be made of the resources that presently exist. In particular, there is a rich body of work that has been produced to guide the establishment of small farming enterprises. Agriculture is among the most common options contemplated for rural properties, so this guidance may be especially useful in some cases. One standout publication in this field is “Evaluating a Farm Enterprise,” from the National Center for Appropriate Technology (2002, updated 2011).<sup>59</sup> The 20-page document includes a narrative discussion of the steps a prospective farm operator should follow, a questionnaire intended to gauge both the property’s potential and the owners’ level of preparedness, a comprehensive list of “alternative enterprises” that may be appropriate for small-scale operations, a cost evaluation worksheet, a market analysis worksheet, and a list of additional resources.

The key strengths of this resource are its clarity and its comprehensiveness. The authors present a logical feasibility assessment methodology and provide a concrete set of questions to help guide owners through the process. The two-page ‘Skills and Resources’ questionnaire is perhaps the most helpful element; users are asked to rate themselves and their properties on 37 metrics under the headings of Personal Resources, Production Experience, Personal Preferences, Farm-Site Characteristics, Market Potential/Demographics, and Infrastructure and Information Support. Importantly, nearly all of the questions may be answered with no expert assistance required; they simply ask for the respondent’s assessment of their personal attributes and the basic characteristics of their land on a scale from low to high.

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<sup>59</sup> Preston Sullivan, Lane Greer, and Tammy Hinman. *Evaluating a Farm Enterprise*, updated ed., Fayetteville, AR: National Center for Appropriate Technology, 2011.

Outside help may be needed to assess farm-site characteristics such as soil quality and availability of irrigation water, but this is as technical as the questionnaire gets. In fact, most of the factors are worded so vaguely as to risk leading respondents to overestimate their readiness to manage a farm operation. The Personal Preferences section, for example, asks respondents whether they “like hard work;” are “a good problem solver;” and “enjoy an outdoor and physical lifestyle.” Anyone thinking about starting a farm would likely respond affirmatively to all three, probably with greater confidence than is warranted. Similarly, asking users to rate their “financial backing or resources” and “management skills” from low to high invites an extremely superficial and subjective assessment that cannot replicate the detailed number crunching that business planning requires. The Cost Evaluation worksheet that accompanies the questionnaire does call for more specificity, asking users to estimate a range of fixed and variable costs, as well as their desired profit.

Despite its shortcomings, the questionnaire in “Evaluating a Farming Enterprise” could be adapted to create a useful reuse feasibility resource for historic property owners. The Site Characteristics section would need to be expanded to include such factors as historical significance, building condition, and public access, and other sections would need to include additional metrics to incorporate the full range of income producing activities that can occur on a rural historic site. The Cost Evaluation worksheet could also be expanded beyond a purely agricultural focus by requiring estimates for initial restoration and/or rehabilitation, ongoing maintenance, personnel, insurance, and other costs associated with operating a business on a rural historic property. The Market Analysis worksheet is heavily weighted toward

agriculture and would require significant rewording to be of use to property owners who are contemplating a broader set of options.

Another model of reuse feasibility guidance is offered in Debra A. Reid's "Starting and Sustaining a Living History Farm," which appears in a 2012 newsletter of the Midwest Open-Air Museum Coordinating Council. As the title suggests, the scope of Reid's advice stretches beyond the purely agricultural focus of the NCAT publication to encompass the opportunities and challenges of operating both a farm and a tourist attraction. As a threshold matter, Reid suggests that those interested in operating a living history farm ask themselves whether their community needs such a facility and then conduct a feasibility study to find the answer. This study should be conducted by an outside party and "must be credible, based in current demographic statistics, taking into account economic conditions and real interest."<sup>60</sup> The historical significance of the site must also be assessed, and for this Reid recommends a methodology outlined by archaeologist John S. Wilson that attempts to determine how representative or exceptional a farmstead is in its local or regional context.<sup>61</sup>

Reid carries the discussion through the process of establishing and then operating a living history farm, including incorporating as a nonprofit and determining governance procedures; interpretive planning; collections stewardship; managing staff; and developing relationships with outside stakeholders. External engagement is critical, Reid argues, to gain both community support and the financial resources necessary for survival; she makes the valuable point that onsite income will

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<sup>60</sup> Debra Reid, "Starting and Sustaining a Living History Farm," *Midwest Open Air Museums* 33:2/3 (2012), 9.

<sup>61</sup> John S. Wilson, "We've Got Thousands of These!: What Makes an Historic Farmstead Significant?" *Historical Archaeology* 24, no.2 (1990), 23-33.

rarely cover expenses and that developing a strong donor base “must be a top priority.”<sup>62</sup>

Reid suggests assembling a multidisciplinary team to attend to the diverse requirements of operating a living history farm, including farmers, historians, architects, lawyers, bankers, agricultural marketers, gardeners, veterinarians, folklorists, archaeologists, and engineers. This list, while likely excessive in some cases, should give pause to rural historic property owners who believe they could manage such an enterprise with only their personal knowledge and commitment. Comparing Reid’s article with the NCAT publication, it is clear that public visitation adds complexities to the planning and operation of a site that preclude the go-it-alone approach that might be possible at a farm that has no interpretive programming.<sup>63</sup>

Some published reuse feasibility guidance is directed toward sites that are either publicly held or are not situated in rural contexts. A particularly valuable contribution to the literature critical of house museums is Donna Ann Harris’s *New Solutions for House Museums: Ensuring the Long-Term Preservation of America’s Historic Houses*. Although the intended audience for her book is nonprofit organizations or public agencies that already operate house museums and are considering other uses, the case studies Harris presents might also serve as cautionary tales for property owners contemplating an interpretive focus for their rural sites. By illustrating the wide range of challenges that have led the administrators of many house museums to seek an exit strategy, Harris could sway some owners to abandon the option before moving forward. Eliminating interpretive programming from the

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<sup>62</sup> Reid, "Starting and Sustaining a Living History Farm," 14.

<sup>63</sup> *Ibid.*, 12.

universe of potential uses would then allow for a more focused feasibility assessment that requires less time and would likely yield a more fruitful list of options.<sup>64</sup>

The case study in Harris's book that most closely resembles the target audience for this paper is, by fortunate coincidence, located in Prince George's County. Hazelwood, a three-part frame structure built in three periods from the late eighteenth century to about 1860, is situated on a 284-acre parcel and has a variety of agricultural outbuildings. The property is now largely wooded but historical records and aerial photography indicate that much of it was cultivated well into the twentieth century. In terms of potential income producing activities, Hazelwood appears well-suited to supporting agriculture, public interpretation, hosting outdoor events, or some combination of these—more or less the full range of options available to a rural historic property. Unfortunately for the purposes of this paper, Hazelwood is not owned privately and no onsite income producing activities have been undertaken to support its ongoing preservation.<sup>65</sup>

The property has been owned since 1976 by the Maryland-National Capital Park and Planning Commission, and since 2005 it has been occupied by a family under the Commission's Resident Curatorship program. The residents' lease allows them to live on the property for 40 years while obligating them to restore the property and make it available for public visitation at least once a year. While opinions vary as to the effectiveness of the arrangement thus far, the resident curator model nonetheless represents a potential means of caring for an historic property, one that

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<sup>64</sup> Donna Ann Harris, *New Solutions for House Museums: Ensuring the Long-Term Preservation of America's Historic Houses*, Lanham, Md.: Rowan & Littlefield, 2007, 11

<sup>65</sup> *Ibid.*, 139.

Harris notes could work for privately owned sites as well.<sup>66</sup> Of course, this option forces the owner to give up their right to live on the property, which would be a non-starter in many cases. However, if the owner's primary concern is preserving the site rather than occupying it, bringing on a long-term tenant willing to invest their own time and money could present a workable solution.

The study by Harris could be useful as a reuse feasibility resource in one other respect. Harris devotes a chapter of the book to describing the decision-making process that a nonprofit house museum board should follow to identify potential new uses and/or ownership arrangements for their site. In theory, this process could be adapted slightly to guide a feasibility study for a property in private ownership. Harris concludes the chapter with a flowchart for the process that could complement the steps outlined in Reid's article on living history farms. The process is more concerned with institutional considerations—who should be involved, when, and in what capacity—and thus is more relevant to board-managed properties than those run by individual owners. This is the situation at Poplar Hill on His Lordship's Kindness, one of the case studies presented in this paper.<sup>67</sup>

Another entry in the catalog of potentially useful reuse feasibility guidance takes the form of a 2005 interagency memo from the Montgomery County, Maryland Department of Parks. The subject of the memo is, "Development and Analysis of Programming Options for the Agricultural History Farm Park."<sup>68</sup> The parallels and contrasts with privately owned rural historic properties are evident immediately. The

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<sup>66</sup> Harris, *New Solutions for House Museums*, 150.

<sup>67</sup> *Ibid.*, 100.

<sup>68</sup> Montgomery County Department of Park and Planning, *Development and Analysis of Programming Options for the Agricultural Farm Park*, Memorandum from John E. Hench to Derick Berlage. Silver Spring, Md.: Montgomery County Department of Park and Planning, 2005.



memo concerns the reuse of an historic farmstead with ongoing preservation needs, but one that is owned by a public agency and already has a history of public visitation. Most private property owners start from a much different baseline, having neither the administrative capacity nor the financial resources of a local government. On the other hand, institutions also face barriers to success as stewards of historic sites and the processes by which they analyze potential uses could have some applicability to private owners.

In this case, County staff identified four options for the 455-acre farm park, part of which comprises the 69-acre historic setting for the late-nineteenth century Magruder-Bussard farmstead and its attendant agricultural outbuildings. The options included: continuing the current suite of interpretive programs and special events; enhancing the site's programming with either an agricultural or historical focus; developing an interactive farm museum with historical interpreters; and operating a fully functioning farm staffed with interpreters. For each option, the memo describes the types of activities that would take place on the site, along with staffing requirements and the need for physical additions and alterations. Comments from several outside interest groups and different county agencies are presented, followed by a full discussion of the findings presented by the staff committee assigned to assess the options. The memo provides reasoning for the majority-supported option (fully functioning farm with interpreters), as well as the minority-supported option (interactive farm museum). The site now operates as a fully functioning farm with both regular programming and special events.<sup>69</sup>

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<sup>69</sup> "Agricultural History Farm Park: Events and Programs," [www.montgomeryparks.org](http://www.montgomeryparks.org).

The Montgomery County memo emphasizes the importance of external engagement and partnerships in both the planning and operation of the historic farm. Indeed, a reading of both the memo and the website for the park as it exists today highlights the central role of the Friends of the Agricultural History Farm Park, an affinity group founded in 1995; the organization sponsors a slate of events throughout the year and was a key stakeholder in the 2005 deliberations. Most privately owned rural historic sites lack this sort of external support structure, but this only highlights the importance of public outreach in building a sense of community investment in whatever use option an owner hopes to pursue on their property. A “friends” group may or may not take shape as a result of this outreach, but the possibility should not be dismissed as they may help manage the site and have better access to grants.<sup>70</sup>

A document that approximates closely the type of reuse feasibility guidance suggested by this paper is Donovan Rypkema’s “Feasibility Assessment Manual for Reusing Historic Buildings,” published for the National Trust for Historic Preservation in 2007.<sup>71</sup> The 108-page document appears to include almost every factor that a property owner should consider when analyzing options for income production on their site, including: the owner’s objectives; legal limitations; national, regional, and local market factors; target market demographics and preferences; political factors; available tax, grant and other forms of assistance; and physical and technical constraints. For each section of the feasibility analysis, the manual explains how a factor may encourage, discourage, or preclude a certain use option, and it asks a series of questions intended to force the user to consider how these factors apply to

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<sup>70</sup> Harris, *New Solutions for House Museums*, 157.

<sup>71</sup> Donovan D. Rypkema, *Feasibility Assessment Manual for Reusing Historic Buildings*, Washington, DC: National Trust for Historic Preservation, 2007.

their site. The penultimate section guides the user through a detailed financial analysis of their project, including an itemized accounting of capital costs and initial funding sources, as well as a multi-year operating statement to project income, expenses, and cash flow over a ten-year period. The steps suggested by Rypkema are all applicable to any property owner who is serious about running their historic site as a commercial concern, although the level of detail required in the process might require outside assistance.

The principal weakness of Rypkema's manual vis-à-vis rural historic properties is its overwhelming focus on urban contexts. Most of the options presented in the reuse matrix are simply not applicable to rural sites; these include transient housing, warehouses, office space, and industrial uses, none of which could feasibly be accommodated within an historic farmstead or its outbuildings without significant alterations to the building fabric. Additionally, the feasibility analysis is geared toward generating the kind of pro forma documents associated with traditional real estate development projects. This might limit its usefulness to the average rural historic property owner, who is not so much looking to earn a specified return as to simply generate a level of income sufficient to support the preservation needs of their buildings and landscapes. The depth of financial analysis Rypkema suggests may be necessary to secure bank financing for a major rehabilitation project but it surely exceeds what is required to plan the financing and operation of a small-scale farming operation, event venue, or house museum. The manual still deserves consideration by

rural historic property owners, however, as they may find its procedural framework useful even as they gloss over some of the more technical aspects it considers.<sup>72</sup>

None of the guidance discussed above provides a clear framework for assessing the feasibility of reuse options at a rural historic site. All provide certain pieces of the puzzle, and the documents by Reid and Rypkema are particularly useful in that they each outline a process for property owners to follow. The available guidance related to rural properties published to date is weighted toward agricultural operations, which might have value for some property owners but not for others. It is unclear whether the lack of guidance to help rural historic property owners conduct a comprehensive feasibility analysis is symptomatic of the larger issue of top-down approaches to rural heritage conservation by preservation agencies and organizations, or whether the subject is considered so dependent on innumerable internal and external factors that no cogent framework could be developed for assessing what uses will or will not succeed for a given property.

### ***Analysis of the Reviewed Literature***

The literature review for this paper considered a variety of sources, including academic treatments of rural heritage conservation and preservation economics, accounts of the “country house” issue in Great Britain, and practical guidance for historic property owners in formats ranging from concise checklists aimed at a general audience to internal government memoranda. The overall finding is that there are few, if any, resources that focus specifically or even substantively on the challenges facing rural historic properties in private ownership. To be sure, the

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<sup>72</sup> Rypkema, *Feasibility Assessment Manual for Reusing Historic Buildings*, 2007.

reviewed sources emphasize certain points that a small farmstead owner should bear in mind when considering reuse options, including the importance of using a systematic feasibility analysis, the need to set realistic onsite income expectations, and the value in consulting both experienced professionals and the public at large. All are useful observations, but they border on the obvious. The larger problem, however, is that the successful execution of any of the strategies outlined in the sources are likely beyond the means of the average property owner. The well-heeled foundation operating a large Hudson Valley estate might have the wherewithal to hire real estate and marketing consultants, but the middle-class heir to a family farm in southern Prince George's County likely has neither the time nor money to do so between fixing leaking roofs and paying the gas bill.

The broader problem identified in the literature review—the generally limited concern shown by the modern preservation field toward rural private property stewardship—deserves greater analysis than this paper can provide. An earlier observation bears repeating, as it might hold some explanatory power: in contrast to Great Britain, where volumes have been written and national programs established that address the “country house” issue, the United States does not ascribe a comparable part of its national identity to its agrarian past. In Britain, the tradition of a landed elite built itself up over centuries and continues to have relevance to the largely native-born population. The United States was barely out of adolescence before the Industrial Revolution and new waves of immigration moved the nation's economic and societal center of gravity to the cities. The majority of Americans living today have little to no personal connection with the country estates and

farmsteads that lie languishing across the landscape, so why should they feel emotionally invested in whether they stand or fall?

Historic properties of all description face the internal and external realities of finite resources and limited public attention. The case studies discussed in the next chapter provide an insight into how property owners, who stand on the front lines of rural heritage conservation, have addressed these challenges.

## Chapter 5: Case Studies

Three rural historic properties were selected as case studies for this paper. Two are located in Prince George's County, Maryland, and the third is located in Logan County, Ohio. The main houses on the three sites vary in terms of age, style, and size, but are similar in several other respects: they all are located on large (over 50-acre) parcels; all are more significant for their architecture than for their association with historical figures or events; and all have been under the stewardship of their current owners for roughly 20 to 25 years. Two of the sites, Villa de Sales and the Piatt Castles, are located roughly an hour's drive from a large city (Washington, DC and Columbus, Ohio respectively), while Poplar Hill is situated in a more suburban context about 30 minutes from Washington, DC. Site visits to each property were conducted in the summer of 2016 and each property owner was interviewed in person. Questionnaires were sent to each owner seeking additional information. Two owners provided responses, which are shown in Appendix A. For each site, information was collected and is presented below on the following topics: a general description of the property and its ownership history; past and current forms of onsite income production; attributes of both the property and its owner that have helped determine appropriate income producing activities; and general observations by the owners and their advice for other owners of rural historic properties.

### ***Poplar Hill on His Lordship's Kindness, Clinton, Maryland***

Poplar Hill is a five-part Georgian mansion built from 1784-1786 on land originally known as His Lordship's Kindness. The brick house comprises a main

block with attached hyphens and wings, all laid in Flemish bond with rubbed brick lintels and other details that speak to its stature and that of its original owner, Robert Darnall. Extant historic outbuildings include a smokehouse, washhouse, aviary, and a number of later structures. The 134-acre property was listed as a National Historic Landmark in 1970 and is also a designated Prince George's County historic site.<sup>73</sup> The property is currently owned by the John M. and Sara R. Walton Foundation, a 501(c)(3) nonprofit organization created by former owner John M. Walton, Sr., who donated the mansion and 7.26 acres to the Foundation in 1995. Walton bequeathed an additional 126 acres to the Foundation upon his death in 2000. John M. Walton, Jr. is president of the John M. and Sara R. Walton Foundation and has primary stewardship responsibility for the property.

Poplar Hill has a history of public visitation that predates the ownership of John M. Walton, Sr., and Sara Walton, who purchased the property in 1955 for their personal use as a residence and farm. The house was featured in a 1931 *Washington Post* article on "Cavalier Homes and Home Life," although no mention is made of the site being open for tours.<sup>74</sup> Five years later, Poplar Hill was among ten historic houses and gardens in Prince George's County opened to raise funds for St. Barnabas Episcopal Church.<sup>75</sup> The house must have been a regular feature on such tours in that period, as it is mentioned in a 1942 *Post* article lamenting that the usual house and garden openings in Maryland and Virginia had been cancelled that year.<sup>76</sup> The house

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<sup>73</sup> Maryland-National Capital Park and Planning Commission, "81A-001 Poplar Hill on His Lordship's Kindness," *Illustrated Inventory of Historic Sites and Districts, Prince George's County, Maryland*, Upper Marlboro, MD: M-NCPPC, 2011, 182.

<sup>74</sup> David Rankin Barbee, "Cavalier Homes and Home Life," *The Washington Post*, February 1, 1931.

<sup>75</sup> "Ten Houses and Gardens Placed on New Itinerary," *The Washington Post*, May 17, 1936.

<sup>76</sup> Katherine Barrett Pozer, "Lovers of Beauty Miss Home Tours," *The Washington Post*, May 17, 1942.



was used again for church-related fundraising in 1952, this time in support of restoration work at St. Thomas's Episcopal Church in Croom.<sup>77</sup>

John and Sara Walton continued and expanded the tradition of allowing periodic public access to Poplar Hill, opening the house, outbuildings, and gardens for tours several times a year. A 1980 Baltimore *Sun* profile of both the site and its owners noted its inclusion in that year's Maryland House and Garden Pilgrimage, the first time it had been on the itinerary in 16 years.<sup>78</sup> Of importance to this case study, neither the Waltons' opening of the house nor its earlier history of public access indicate that visitation was used as a source of income to support the preservation of the property. Walton was an architect by profession and could apply his expertise to maintaining the structure; it is not clear what condition the house was in when he and his wife purchased it from the Archdiocese of Washington in 1955 and whether some initial investment was required to address existing problems. It is known, however, that the Waltons were interested in leveraging the site's assets for financial purposes. A full-time farmer was employed to oversee raising corn, soybeans, hay, and oats on the property, with horse boarding providing additional revenue. Walton also had a collection of horse-drawn carriages that he hoped would eventually become a museum, although this vision appears to have remained unfulfilled.<sup>79</sup>

John M. Walton, Jr. said that Poplar Hill was in "good to very good" condition when his parents purchased the property; however, time had taken its toll by the time he assumed primary control after their deaths. Walton opened the house

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<sup>77</sup> Audrey Bishop, "Where Calverts Rest," The Baltimore *Sun*, September 21, 1952.

<sup>78</sup> Marcelle Sussman, "A Georgian Gem To Be on Tour of Maryland Houses in April," The Baltimore *Sun*, March 30, 1980.

<sup>79</sup> Ibid.

for tours on a more regular basis, and in the late 1990s a part-time staff member was employed to help manage the property. In 2002, the position of museum manager became full-time and a secretary was also hired. While public visitation to Poplar Hill increased, the main source of income for the property remained as it had been during the ownership of the elder Waltons, that is, horse boarding and rental of the two single-family homes located on the property, which his parents had begun in the 1960s. Walton said that both activities had “a proven track record of producing significant income,” and to this day they produce the overwhelming share—54 percent and 43 percent, respectively—of onsite financial support. While the property has ample acreage that could be put to a variety of agricultural uses, Walton says that horse boarding involves less labor and provides a greater return on investment than growing crops.<sup>80</sup>

The financial position of Poplar Hill was heavily impacted by the economic downturn of 2008-2009, which nearly wiped out the Foundation’s investment fund and the dividend income it generated. Fortunately, a great deal of work had already been completed on the structure of Poplar Hill, partly supported by a grant from the Save America’s Treasures campaign and a County bond bill. Nevertheless, urgent preservation needs remained that could not be funded after the crash. The paid staff was let go and public access to the site was drastically curtailed. Today, tours are available by appointment for groups of 12 or more; this provides just two percent of onsite income, the remaining one percent coming from rental of the mansion for special events. Horse boarding and rental of the two smaller houses on the property continued to provide income even as visitation decreased, but were insufficient to

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<sup>80</sup> John M. Walton, Jr., personal communication, September 19, 2016.

meet the needs of the property. A prominent preservation contractor in Prince George's County developed an itemized and prioritized list of projects required to address Poplar Hill's most pressing preservation needs and to equip the site for active use as a museum. The list ran for several pages and amounted to an estimated total in the seven figures, an unfathomable prospect given the site's financial circumstances.<sup>81</sup>

Walton acknowledges that the costs of restoring and maintaining Poplar Hill have exceeded the initial expectations of the Foundation, while the income produced onsite has fallen short of expectations—sufficient to fund the site's regular care and maintenance but totally inadequate to meet its major maintenance and preservation needs. Fortunately, some innovative funding sources have been recently identified and utilized that take advantage of the property's large size. In Prince George's County, as in other jurisdictions, developers with projects that impact woodlands and other natural resources are in certain cases required to fund the preservation of an equivalent area of undeveloped land elsewhere. In the case of Poplar Hill, the site has 51 acres of low-lying woodland and 11 acres of pasture that is available for such purposes, and the Foundation has worked with a mitigation services provider to connect with a developer in need of acreage to preserve. One transaction has already been completed that provided a substantial sum, and similar opportunities could arise in the future. This source of funding, while valuable, has still provided only a small fraction of what would be required to complete the full list of projects that have been identified to fully restore Poplar Hill and prepare it for reuse.<sup>82</sup>

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<sup>81</sup> John M. Walton, Jr., personal communication, June 17, 2016.

<sup>82</sup> Ibid.

John M. Walton, Jr. remains committed to the preservation of Poplar Hill, and several factors contribute to his ability to do so. First, he began his stewardship of the site with a deep familiarity with its challenges and possibilities. Second, he has 25 years of experience managing historic properties in Prince George’s County through his earlier career with the Maryland-National Capital Park and Planning Commission. Third, the establishment of the John M. and Sarah R. Walton Foundation by his parents laid an institutional groundwork for managing the site that has also allowed Walton to seek funding opportunities available only to nonprofit entities. Fourth, several income-producing activities with solid track records were already in place when he assumed primary responsibility for the site, which he has been able to continue even as tour income decreased and the Foundation’s investment fund was decimated by broader economic factors. Going forward, Walton says, the main goal of the Foundation is to re-establish and grow the investment fund in order to address the property’s most pressing maintenance and preservation needs and to open the mansion for tours on a regular weekly schedule. Looking back on his nearly 20 years as primary steward of Poplar Hill, Walton believes historic property owners should “think outside the box” and explore the feasibility of as many different compatible income producing activities as possible to support their preservation requirements.<sup>83</sup>

### ***Villa de Sales, Aquasco, Maryland***

Villa de Sales is a large Victorian Gothic frame mansion built in 1877 by John D. Bowling for his sister, Fanny Bowling Forbes. A near-replica of the house, Bowling Heights, was built in the same year by Bowling as his personal residence

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<sup>83</sup> Walton, personal communication, September 19, 2016.

near Upper Marlboro. Villa de Sales has remained in the Forbes family since its construction and was designated a Maryland Bicentennial Farm in honor of the property's continuous ownership by the same family for over 200 years.<sup>84</sup>

The house is currently owned jointly by Angel Forbes Simmons and her mother, Mary Mittie Forbes Simmons, who inherited the property from her father in 1950. Although some extended family members were living in the area at the time, Mary lived in Florida and was not in a position to move her family back to Maryland. The house was alternately vacant or rented out for most of the next 50 years, during which time the condition of the property steadily deteriorated. Mary spent a significant amount of money on repairs and maintenance as an absentee owner, but the work was neither done well nor supervised adequately by family members in the area. Angel Simmons, who had grown up in Florida and settled in the state of Washington after graduate school, nonetheless felt an attachment to the house and moved there in 1996 with the intention of restoring it and preventing its sale out of the family. She arrived to find no electricity or running water and was forced to sleep in a tent inside the house for the first three months. Despite its overall dirtiness and lack of working utilities, however, the house was structurally sound and the windows were generally in good condition. The most immediate need was to repair the leaking roof, which if left unabated would compromise the interior features of the house.<sup>85</sup>

Simmons was determined to make Villa de Sales self-sustaining; however, her knowledge of farm management was admittedly lacking when she took over primary responsibility from her mother. She considered continuing her career in IT

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<sup>84</sup> Villa de Alpacas Farm, LLC, [www.marylandalpacaafarm.com](http://www.marylandalpacaafarm.com).

<sup>85</sup> Angel Forbes Simmons, interview with the author, September 14, 2016.

management, which could have provided sufficient income to support the property but likely would have required a lengthy commute. Believing this would defeat the purpose of her cross-country move, she began researching options that would leverage the site's ample acreage and ensemble of reusable outbuildings. She considered growing and marketing tea, but early attempts to cultivate a crop failed. She quickly settled on the idea of raising alpacas, which drew on her love of animals and for which she thought adequate infrastructure was already in place. The animals could be housed in a former tobacco barn and fencing could be erected quickly around some of the pastureland; specialized farm equipment was lacking but was unnecessary for raising alpacas. Simmons soon purchased livestock and her new business, Villa de Alpacas Farm LLC, was up and running.<sup>86</sup>

For roughly the first decade of operation, Simmons generated income solely through buying and selling alpacas. As at Poplar Hill, the economic downturn had a significant impact on the financial situation at Villa de Sales, not due to diminished investment holdings but because the sale price of alpacas declined precipitously. This setback pushed Simmons to redirect her focus toward producing and marketing alpaca fiber and related goods, for which she purchased and received training on specialized felt looms from a manufacturer in Kentucky. This represented a significant new investment for Simmons, but one that has paid off in the years since. She says she now derives 100 percent of her business income from fiber production and sales. Villa de Alpacas LLC sells its line of textiles online and through visits to the property, which are usually by appointment except during weekend open houses held from Thanksgiving to Christmas. Simmons also generates business by traveling

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<sup>86</sup> Simmons, interview, September 14, 2016.

to fairs and conferences around the country and through cross-marketing with other historic properties located nearby.<sup>87</sup>

The success of Villa de Alpacas LLC is linked directly to the preservation of Villa de Sales, which has remained Simmons' top priority in her two decades of stewardship. She says that business income has exceeded expectations in some years and fallen short in others, while the costs of restoring and maintaining the site have exceeded her initial projections. As at Poplar Hill, the ample acreage surrounding Villa de Sales has permitted other forms of financial support. In 2010 Simmons enrolled in the Maryland Department of Natural Resources' Rural Legacy Program, which paid roughly \$7,000 per acre for a perpetual easement on 46 acres on the property. The program supports Simmons' vision for Villa de Sales in both the short term, by providing needed funding to preserve the structures, and in the long term, by protecting the property from future development. Simmons has also applied for and received grants from the Prince George's County Historic Properties Grant Program to restore the Victorian stable.

Personal factors have also contributed to Simmons' ability to restore and maintain Villa de Sales. When she arrived in 1996, she had retirement savings that she could use to address the immediate needs she encountered in the house. She was also able to secure a loan of \$150,000 from Colonial Farm Credit, a rural finance company operating in southern Maryland and eastern Virginia, which she was able to pay off within three years. A more recent development has been particularly valuable, for Simmons personally and for Villa de Sales. While seeking out restoration contractors, Simmons met Tom Moore, who owned a business specializing in custom

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<sup>87</sup> Simmons, interview, September 14, 2016.

woodwork and reproductions. A mutual interest in historic preservation spurred a closer relationship that eventually led to marriage, and Moore's company, Sterling Millworks, is now operated from a large outbuilding on the Villa de Sales property. Aside from helping Simmons manage the site, having an in-house supplier of architectural and decorative woodwork has reduced the cost of maintaining the house's distinctive Victorian features. Its vergeboards, porch brackets, and shingles are all kept in excellent condition thanks in large part to the expert craftsmanship that entered fortuitously into Simmons' life. While the income from Moore's business is helpful in a general household sense, Simmons said the proceeds from Villa de Alpacas LLC are enough to pay the operating and maintenance costs of the property.

Reflecting on her 20 years as chief caretaker of Villa de Sales, Simmons offers some advice for owners of rural historic properties hoping to produce onsite income. First, a business must identify a niche for itself, something she admits took time to develop with Villa de Alpacas. She recommends seeking professional help with advertising, including establishing an effective online presence, as well as collaborating with other business owners at nearby historic properties. Simmons, for example, cross-markets with the P.A. Bowen Farmstead, which offer tours of its dairy operations and sells artisanal cheese among other products. In terms of restoring an historic house, Simmons advises owners to "compartmentalize," focusing on one area at a time rather than trying to fix the entire structure at once. To illustrate her point, she relates the story of a neighboring property owner who ran out of money trying to



restore everything at once; the property was lost to foreclosure and remains languishing in poor condition.<sup>88</sup>

### ***The Piatt Castles, West Liberty, Ohio***

The Piatt Castles are a pair of Gothic Revival chateau-style houses located near West Liberty, Ohio. The two houses, named Mac-A-Cheek and Mac-O-Chee, were completed in 1871 and 1879, respectively, for brothers Abram Saunders Piatt and Donn Piatt. Both houses are striking in their architectural expression, particularly given their rural context, and both retain a high degree of integrity in their character-defining exterior and interior features. The houses are located roughly one mile apart and sit on 80 non-contiguous acres, the majority of which lies adjacent to Mac-A-Cheek. Both houses have remained in the Piatt family since their construction and are now under the ownership of Piatt Castles, Inc., of which Margaret Piatt is the president. The company was formed in the 1970s by Margaret's father and uncle, with Margaret inheriting shares from each upon their deaths and becoming primary shareholder after her brother died in the 1990s. In 1994, a 501(c)(3) organization, the Mac-A-Cheek Foundation for the Humanities (MFH), was formed with the aim of raising funds for research and programming at the Castles.

The Piatt Castles have functioned as both private residences and a tourist destination for the majority of their existence, first opening for tours in 1912. The property remained occupied by the family until 1985. The site was overseen by a resident manager until 1992, after which Margaret Piatt managed its affairs in absentia before returning to Ohio from Massachusetts in 2002. Piatt and her husband

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<sup>88</sup> Angel Forbes Simmons, interview with the author, September 14, 2016.

live in an early-twentieth century house adjacent to Mac-O-Chee that she purchased in 1999. The condition of the Castles at the time Piatt assumed full responsibility was generally good, inasmuch as they were structurally sound. Mac-O-Chee had experienced serious restoration challenges and both houses had deferred maintenance needs that were largely addressed between 1984 and 2004. Mac-A-Cheek, the more consistently occupied house of the two, was (and remains) in better condition.

Piatt's intention upon moving to the site was that she would devote herself full-time to the stewardship of the Castles. However, both the preservation needs of the property and the money required to address them were greater than expected and more than could be satisfied by income produced onsite. Added to this, the local school system and chamber of commerce stopped sponsoring tours to the site in 2005, which had an immediate and significant impact on its finances. That year, recognizing the need for additional income to support the Castles, Piatt started teaching drama at Urbana University in Dayton; she took a full-time position at the school in 2009 and retired in 2016. In addition to teaching, Piatt also works as a museum consultant and as a director for a local theater. Despite these efforts to supplement the Castles' onsite income, 95 percent of which comes from tours, Piatt says there has been inadequate funding to keep up with maintenance at the site, let alone larger restoration projects. The level of deterioration is particularly acute at Mac-O-Chee, which is the more architecturally significant of the two houses but also the more neglected due to a longer period of vacancy.

Margaret Piatt began her stewardship of the Castles with high hopes for the site's ability to generate income. With ample acreage at her disposal, Piatt envisioned

such possibilities as a conference center, high-quality gift shop and restaurant, education center, and lodging for onsite field studies. However, neither Piatt Castles Inc. nor the MFH nonprofit had the necessary startup funding for any of these ventures. The curtailment of school tours reduced the prospects for these innovative uses still further. Piatt also points to a general lack of interest in cultural programming among the surrounding population; she cites data from the Champaign County Chamber of Commerce showing that 37 percent of the county's adult population had not graduated high school and 25 percent completed high school but had no college education. Given the demographic realities she confronted, Piatt consciously refocused programming to cater to a lower-income, less educated audience, offering more free days and what she calls a "remedial museum experience."<sup>89</sup>

Piatt arrived in 2002 with a wealth of personal experience to draw on in determining what income producing activities to pursue at the Castles. For more than 30 years she worked as a museum educator at historic sites, including Old Sturbridge Village in Massachusetts, and has published articles on open-air museum programming. As with Angel Simmons at Villa de Sales, Piatt is fortunate to be married to a professional restoration carpenter who is able to complete some work on the Castles himself. Aside from these personal resources, Piatt has also received guidance from Ohio Humanities (formerly the Ohio Humanities Council) and intends to seek more help from state and regional organizations going forward. To enhance her marketing efforts, Piatt joined local business organizations and chambers of

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<sup>89</sup> Margaret Piatt, interview with the author, July 3, 2016.

commerce in the surrounding three counties and has sought collaborations with other nonprofit and educational organizations in the area.<sup>90</sup>

The property itself has several supportive attributes, including a long history of paid public visitation and over 30 acres of farmland that can be leased out. The proceeds from farm leasing are helpful but account for just three percent of revenue generated onsite. The unique aesthetic qualities of the houses and their immediate surroundings make the site popular for weddings and other events, but these provide only two percent of the onsite revenue.

Piatt is currently considering changes to the site's ownership, management, and programming that will serve the overall goal of preserving the two Castles over the long term. She plans to form an advisory committee to MFH focused specifically on the future of Mac-O-Chee. The committee will decide whether to "save it or sell it," with the latter option contemplating an individual or organization with the necessary resources to restore the house and put it to some use related to architecture, literature, history, or the arts. As for Mac-A-Cheek, Piatt and her husband are currently converting some spaces into a private suite to allow them to live in the castle and either sell or rent their current house. Piatt says that public access might be reduced if this is determined to benefit the long-term preservation of the site. Currently, the Castles are open daily between Memorial Day and Labor Day and on weekends from mid-April through the end of October. Going forward, Piatt would like to devote more resources to documenting the history of the property, particularly its more than 100 years as a tourist destination.

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<sup>90</sup> Piatt, interview, July 3, 2016.

In terms of advice that Piatt would share with rural historic property owners seeking to produce income onsite, she suggests developing clear goals and having sufficient startup funding for the intended use or programming. She also sees value in hiring competent professional staff, an important acknowledgment given that Piatt’s stewardship of the Castles has benefited from her own background in museum education, her husband’s skill in restoration carpentry, and her daughter’s experience in marketing and communications. The point is that whatever experience and talents an owner can bring to bear on managing a business on a rural historic property, there are likely to be competency gaps that can only be filled with outside expertise.<sup>91</sup>

Table 5.1. Summary data for case study properties

	<b>Poplar Hill</b>	<b>Villa de Sales</b>	<b>Piatt Castles</b>
<b>Year built</b>	1784-1786	1877	1871-1879
<b>Acreage</b>	134	52	80
<b>Baseline condition</b>	Good to very good	Structurally sound; roof repair needed	Serious restoration needed
<b>Driving time to population center</b>	30 minutes	1 hour	1 hour
<b>Ownership/ Management</b>	Nonprofit	Personal / LLC	Corporate / Nonprofit
<b>Costs vs. expectations</b>	Exceeded	Exceeded	Exceeded
<b>Onsite income vs. expectations</b>	Fallen short	Fallen short	Fallen short
<b>Current sources of onsite income</b>	Horse Boarding 54% Rental of houses 43% Mansion rental 1% Mansion tours 2%	Alpaca fiber 100%	House tours 95% Farm leasing 3% Gift shop sales 1% Property rental 1%
<b>Other income sources</b>	Endowment Mitigation banking Personal income	Land preservation easement	Personal income

<sup>91</sup> Margaret Piatt, personal communication, August 28, 2016.

### *Analysis of the Case Studies*

While every rural historic property faces a unique set of both challenges and opportunities, the three case studies demonstrate that there are certain factors related to owner resources and constraints, site attributes, and the local context that are at least somewhat determinative of a property's ability to sustain itself.

The case study properties vary in terms of the condition of their main structures at the time the current owners assumed their stewardship responsibilities. This has had an impact on the owners' capacity to conduct income-producing activities, since any money required to address urgent preservation reduces the funding available for equipment, staff, or inventory needed to run a business on site. Villa de Sales was arguably in the best condition of the three, with numerous improvements needed but no major defects in the building envelope. It also helped that, unlike at Poplar Hill and the Piatt Castles, public access to the main house at Villa de Sales was not a necessary part of the owner's business plan and so restoration could proceed as funds became available without impeding the growth of the business. The primary goal of the Poplar Hill owner has been to open the house for tours, which requires not only that the structure be sound but also that interior improvements be completed in advance of opening. The Piatt Castles have managed to remain open for tours even as significant restoration work is needed at one of the houses, perhaps because their attraction lies more in their architectural uniqueness than in the refinement of their presentation.

The case studies also demonstrate the importance of having ample acreage available for income producing uses. The most common use for large properties has

traditionally been agriculture, whether conducted by the owner as a part of their business plan, as is the case at Villa de Sales, or by leasing acreage to other farmers, as at the Piatt Castles. The Poplar Hill and Villa de Sales examples also illustrate how large properties can earn income through environmental mitigation and rural land preservation programs. Such programs do not exist in all localities, nor can they be guaranteed to generate as much money for the property over the long term compared to agriculture or other uses. Their chief advantage is that they provide a relatively quick infusion of capital; their main disadvantage is that they foreclose any other use for that portion of the property's acreage in perpetuity. Local market conditions can also help or hinder the success of a historic property's business plan. Poplar Hill can market itself to an educated, affluent local audience, whereas the Piatt Castles has had to pitch its appeal to a community with less interest in cultural tourism.

The importance of a property owner's personal resources and constraints is perhaps the most informative lesson to emerge from the case studies. Fortunately, and perhaps atypically, none of the owners began their stewardship without at least one key attribute that has prepared them to care for a historic property while conducting income-producing activities to help them do so. Angel Simmons arrived at Villa de Sales with significant financial resources with which to address the house's immediate preservation needs. While she had no experience in farming, she had a clear sense of her own interests and goals and carried out substantial research to help her arrive at a viable business concept that could be established quickly. John M. Walton, Jr. brought his long experience managing historic sites to the task of running Poplar Hill, which gave him knowledge of what might or might not work for the site.

Similarly, Margaret Piatt returned to her family property after more than 25 years working in the field of living history education, which helps her recognize both the promise and pitfalls inherent in operating a historic house museum.

An additional observation from the case studies deserves mention, as it has universal application. To varying degrees, all three properties were impacted by the economic downturn of the late 2000s. In the case of Poplar Hill, the endowment set up by the John M. and Sara R. Walton Foundation was nearly wiped out, forcing the site to lay off its full-time staff and significantly curtail its tour schedule. At Villa de Sales, the recession caused a major drop in the market price for alpacas, leading owner Angel Simmons to redirect her business toward textiles. The Piatt Castles, located in the Rust Belt, has for many years seen the surrounding community suffer as a result of the decline in the manufacturing sector; the situation became particularly dire during the recession, with the unemployment rate in Logan County doubling, from six percent to 12 percent, between 2008 and 2009.<sup>92</sup> While economic conditions have since improved, these experiences illustrate two important lessons for historic property owners. First, a business plan that includes diverse income streams provides more protection against economic fluctuations than does a single-minded focus on, say, interpretive tours or raising a particular type of crop or livestock. Second, a site's financial reserves should be invested conservatively so that their value is not overly sensitive to movements in broader market indices.

Certainly, there are factors related to the sustainability of rural historic properties that are not captured in the three case studies discussed here. Nevertheless, the lessons they offer, together with the lessons that emerge from the earlier literature

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<sup>92</sup> "Logan County, Ohio, detailed profile," [www.city-data.com](http://www.city-data.com), accessed November 5, 2016.



review, point to a clear conclusion. Every property owner should approach his or her stewardship responsibilities with as much knowledge and preparation as possible, giving due consideration to site-specific attributes, local market conditions, and their own personal resources and constraints. The next chapter provides an overview of the factors that should inform any reuse feasibility analysis for a rural historic property.

## Chapter 6: Proposed Reuse Feasibility Guidance

Completing a reuse feasibility analysis is a necessary step for any rural historic property owner who seeks to generate income in order to fund the immediate and ongoing preservation needs of their site. This analysis is best conducted by a professional consultant trained in historic building systems and land conservation methods, market analysis, and small business management. It is rare that an expert in historic preservation will also be versed in business, meaning that a team of professionals may be best suited to the task of reuse feasibility analysis. This paper acknowledges, however, that the majority of historic property owners do not have the financial means to hire professional consultants to tell them what they should do, particularly when urgent capital projects place demands on their limited resources. The guidance presented below is intended to help property owners conduct their own reuse feasibility analysis, and although it cannot hope to replicate the services of a professional, it should at least help owners make more informed investment decisions than might otherwise be the case.

The guidance takes the form of a set of considerations grouped within three headings: owner resources and constraints; site-specific attributes; and the market and partnership landscape. The considerations are presented in narrative form below and summarized in a table at the end of this chapter. As property owners read through the considerations, they should keep in mind that the list is not exhaustive. Each site and each owner is unique, and the specific approach they take to this analysis matters less than that they follow *some* thoughtful method that helps them determine what income producing uses have a reasonable prospect of success on their property.

### ***Owner Resources and Constraints***

The first step in the reuse feasibility analysis is for property owners to consider their own resources and constraints, the personal attributes that will either help or limit their ability to operate an income-producing historic site. First, property owners should go through the exercise of thinking through and writing an answer to the question, “What is my vision for this property over the short and long term?” There is no wrong answer, but the response could narrow the set of reuse options; for example, setting a goal of restoring an eighteenth-century house to its original appearance and interior configuration is incompatible with reuse as a bed and breakfast unless the target audience cares more for authentic historical experiences than indoor plumbing. Likewise, a vision of maintaining a property’s main house as a purely private space will limit the site’s interpretive possibilities.

Once the owner has established his or her overall vision and goals for the property, a practical matter to consider is the form of ownership and management that will be applied to any income-producing activities. The case studies illustrate different possible arrangements, including non-profit ownership and management (Poplar Hill), personal ownership with corporate (LLC) management (Villa de Sales), and corporate ownership with both corporate and nonprofit management (Piatt Castles). Property owners should weigh the benefits and downsides of each option, including how it affects tax liability and eligibility for grants and other incentives in the state and locality in which they reside. Free resources are available to help property owners research different business types.<sup>93</sup> State and local historic

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<sup>93</sup> See for example, “Choose Your Business Structure,” U.S. Small Business Administration, <https://www.sba.gov/starting-business/choose-your-business-structure>.

preservation offices and small business agencies can provide information on what incentives are available to nonprofit and for-profit entities.<sup>94</sup>

The property owner must determine how much of their personal money they can commit to addressing both immediate preservation needs and the startup costs of a new business. If urgent and costly structural repairs are identified in the conditions assessment phase of the feasibility analysis, this could preclude a reuse option for the site that involves large capital outlays on equipment, furnishings, or manpower. The owner should forecast likely expenses over at least a ten-year time frame, including future operations, capital improvements, and maintenance costs for the property and anticipated business. Related to this, a property owner should determine their tolerance for financial risk over the short and long term. This analysis would benefit strongly from the advice of professionals who are able to provide investment advice and can help prepare pro forma documents. A clear understanding of these constraints will help determine how much, and by what means, a property owner should seek additional capital through loans, grants, donations, or other means to supplement the personal financial resources they can apply to their reuse project.

Aside from financial resources, property owners must consider what personal or professional experience they have that could help them both care for a historic site and operate a small business. In two of the three case studies, Poplar Hill and the Piatt Castles, the owners assumed responsibility for their properties after spending at least 25 years working in historic site management and/or interpretation. This level of expertise is atypical among historic property owners, but useful experience can take a

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<sup>94</sup> In Prince George's County, Maryland, this information is available in Chapter 10 of the 2010 Approved Historic Sites and Districts Plan.

variety of forms; a hobbyist carpenter might be able to take on some of the necessary restoration work on a site, while a retired bookkeeper or nonprofit treasurer would have an advantage in maintaining its finances. If additional “in-house” talent can be leveraged, this reduces the need for paid staff or contractors and frees up money for other purposes. At Villa de Sales and the Piatt Castles, family members have brought valuable skills to bear on the operation of the sites.

Personal relationships with the local government, nonprofit organizations, and other potential partners are also important resources for a rural historic property owner to consider. A longtime resident with strong community ties is at an advantage compared to a newcomer when the time comes to apply for a zoning variance or seek grant funding from the local preservation society. An out-of-town buyer might arrive with substantial capital and thus be less dependent on such relationships to get their project moving; however, sustaining an income-producing historic property over the long term will require an investment in building these community ties so that local residents, businesses, and government officials feel invested in the site’s success.

### ***Site-specific Attributes***

The second phase of the reuse feasibility analysis considers characteristics of the site itself. The first step is assessing the baseline condition of structures on the property. This is best accomplished through of a historic structures report or a building condition assessment by a restoration architect or other professional versed in the assessment of old buildings. A BCA is typically less expensive than an HSR and is often a first step that may lead to preparing a more complete report. A professional assessment is money well spent for property owners working on a

limited budget, as it can provide a baseline conditions assessment, an evaluation of architectural integrity and building chronology, and recommendations on how to prioritize the property's immediate preservation needs and ongoing maintenance requirements. Maintenance recommendations are not always included in these reports, so property owners should ensure that they are made part of the contracted scope of work. After a building is restored and/or rehabilitated and a reuse program is in place, a property owner should develop a maintenance plan to guide future capital improvements and avoid large deferred maintenance costs in the future.<sup>95</sup>

If a full HSR or BCA is not possible, the property owner is advised to, at a minimum, enlist a structural engineer to determine whether there are threats to the building's structure that are not identifiable to the untrained eye. Assessing other aspects of the condition are important but secondary to a structural evaluation, and in many cases can be done reasonably effectively by the property owner if they do their homework. As a starting point, owners are advised to read the "Preservation Briefs" and "Preservation Tech Notes" published by the Technical Preservation Services branch of the National Park Service. The briefs cover a wide range of topics, including assessing the condition of older structures.<sup>96</sup> Several reputable books have been published on the subject of historic house preservation, including *Caring for Your Historic House*, co-published by the National Park Service and Heritage Preservation, and *Caring for Your Old House*, published by the National Trust for Historic Preservation. David Arbogast's *How to Write a Historic Structure Report*

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<sup>95</sup> Brent Leggs, personal communication, December 3, 2016.

<sup>96</sup> "Preservation Brief 43," Technical Preservation Services, National Park Service, U.S. Department of the Interior, <https://www.nps.gov/tps/how-to-preserve/briefs.htm>.

could assist property owners with their initial condition assessment, although the book is aimed primarily at preservation professionals.<sup>97</sup>

Beyond assessing conditions and determining immediate preservation needs, a property owner should determine the potential uses for their structures. A key consideration here is the level of public access that is contemplated for the main structure and/or any outbuildings. Visitor traffic imposes greater stress on a structure than does strictly private use, entails a higher degree of liability on the part of the owner, and may require that accommodations be made to comply with the Americans with Disabilities Act. A professional structural assessment is unavoidable for any building intended for public visitation, whether as an event venue, interpretive space, product showroom, or otherwise. The capital costs and ongoing maintenance requirements associated with reusing a building are also affected by the preservation treatment selected, whether the building is to be preserved, restored, or reconstructed to reflect a period of historical significance, or rehabilitated to allow for more flexible use of the space. The reuse feasibility analysis should weigh these costs against the potential of each building to support the site's income-producing operations.

Moving beyond structural conditions, owners should consider attributes of the property as a whole. Of the total acreage of the property, the owner should determine how much land is available for different uses that could generate income for the site. This includes agriculture, which could mean either growing crops or raising livestock. The Villa de Sales case study indicates that the latter is less sensitive to soil quality and drainage, and requires less work to maintain; however, each site is different and

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<sup>97</sup> David Arbogast, *How to Write a Historic Structure Report*, New York: W.W. Norton & Company, 2011.

raising crops should not be dismissed if there is an established record of success. If a farming operation is the owner's intended use for some part of the property, they should consult a resource such as the "Evaluating a Farm Enterprise" document referenced in the literature review to determine the feasibility of their proposed crop plan.<sup>98</sup> Local agricultural organizations also provide valuable assistance to first-time farmers; in Prince George's County, for example, property owners can take advantage of the expertise offered by the University of Maryland Extension and the Prince George's County Soil Conservation District. Property owners also have the option of leasing acreage to farmers, which reduces their own risk, as is the case at both the Piatt Castles and Poplar Hill. Acreage for development mitigation could be valuable, as indicated by the Poplar Hill case study. If a property's open space is not conducive to agriculture or is not eligible for a mitigation or easement program, owners should consider the potential for hosting concerts, camps, and other open-air events.

Another important site attribute is the means of ingress and egress, particularly if public access will be required for the site's proposed form of reuse. Can the property's driveways and paths accommodate coaches and school buses; limousines; catering and equipment rental trucks; emergency vehicles? Are there certain vehicle types that cannot be accommodated on adjacent public roadways? This phase of the reuse feasibility analysis is also the appropriate point at which to investigate any legal restrictions on how the property can be used as a result of deed restrictions, easements, or the local zoning ordinance. The owner should also confirm whether their property is subject to a local historic preservation ordinance that might impose additional restrictions on how the property can be restored and/or reused.

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<sup>98</sup> Sullivan, Greer, and Hinman. *Evaluating a Farm Enterprise*.



### ***Market and Partnership Landscape***

The characteristics of the area in which a rural historic property is located can either support or discourage certain reuse options. As with the assessment of structural conditions, a professional consultant can provide the most comprehensive analysis of the local and regional market and should be consulted if possible. Short of this, there are several considerations that property owners can include in their reuse feasibility analysis to help them make more informed investment decisions. The size of the local population, at various radii from the site, provides a sense of the likely audience for whatever products, services, or attractions are to be offered. It is also important to consider whether the population is evenly dispersed or concentrated in certain places, particularly if a reuse option is being considered that depends on transporting produce or other goods from the property to retail outlets. If a larger percentage of the target audience is concentrated in one part of the overall “catchment” area, this could translate to lower costs for transportation and customer acquisition (i.e. marketing).

Aside from the size and distribution of the surrounding population, historic property owners should also study the characteristics of their target audience using measures of household income, educational attainment, age, ethnicity, and average household size. In some cases, these factors will directly impact the feasibility of a certain use; a living history farm may have broad appeal in an area with a large percentage of families with children at home, while a site with frequent weekday programming may appeal to retirees. In other cases, demographics might not so much argue for or against a certain use but rather affect the way that use is marketed. At the

Piatt Castles, the owner has maintained the focus on historical interpretation while adjusting prices and offering different ancillary events to widen the site's accessibility and appeal among the local community. The U.S. Census Bureau, through its American FactFinder website, offers a wealth of data that historic property owners can use in their analysis.<sup>99</sup> Local and state tourism and economic development agencies can also provide valuable market data. A less academic but possibly more useful approach would be to conduct a "windshield survey" of the local area to determine its general character, noting such factors as the prevalence of school-age children and the types of businesses that appear to be thriving. This survey should also note the condition of historic structures in the area, as this can provide a rough measure of the local population's concern for preservation.

Rural historic property owners should also investigate what might be termed the partnership landscape, which comprises entities that could provide financial assistance or other avenues for collaboration. These entities include, but are not limited to, local and regional nonprofits focused on history, agriculture, or the arts; the local school system and area universities; local businesses; and local and state agencies that provide grant funding, tax abatements, or other assistance to historic properties. Leveraging the assets of the partnership landscape may take a variety of forms, from a cross-marketing agreement with a local catering company, to a standing schedule of monthly visits by area schools, to an easement held by a nonprofit or government agency in exchange for financial assistance. If a property is located in a jurisdiction with development mitigation requirements, the owner should investigate whether their property contains land eligible for such programs.

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<sup>99</sup> "American FactFinder," [factfinder.census.gov](http://factfinder.census.gov).

Table 6.1 Reuse feasibility analysis factors for rural historic properties

<b>Reuse Feasibility Factor</b>	<b>Methodology</b>	<b>Case Study Examples</b>
<b>I. Owner Resources and Constraints</b>		
<b>1. Short- and long-term vision</b> a. Effect on reuse options	Self-assessment	Poplar Hill: Re-open the house for tours Villa de Sales: Preserve house and setting Piatt Castles: Preserve Mac-A-Cheek; sell Mac-O-Chee
<b>2. Ownership/ management structure</b> a. Tax liability b. Access to grants, etc.	Online resources (e.g. <a href="http://www.incorporate.com/business_structures.html">www.incorporate.com/business_structures.html</a> ) Consultation with local government (e.g. historic preservation office)	Poplar Hill: NP ownership / management Villa de Sales: Private ownership / LLC Piatt Castles: Corporate ownership / NP affiliate
<b>3. Available upfront capital</b> a. Restoration budget b. Business startup budget	Self-assessment HSR/conditions assessment Research on precedent sites with similar uses	Villa de Sales: Retirement income from prior job
<b>4. Anticipated future expenses</b> a. Property-related b. Business-related c. Personal	Self-assessment HSR/conditions assessment	Piatt Castles: Restoration of Mac-O-Chee Poplar Hill: Restoration / adaptation for tours Villa de Sales: Long-term care for family member
<b>5. Financial risk tolerance</b>	Professional consultation Self-assessment	No case study information available
<b>6. Professional/ personal experience</b> a. Preservation/ technical b. Education c. Small business management d. Marketing	Self-assessment	Poplar Hill: Previous career in site management Villa de Sales: Financial skills Piatt Castles: Previous career in museum education; experience in theater and the arts
<b>7. Available “in-house” talent</b>	Self-assessment	Villa de Sales: Carpentry/restoration Piatt Castles: Carpentry; marketing; web hosting
<b>8. Community relationships</b> a. Local government b. Nonprofits	Self-assessment	Piatt Castles: local chambers of commerce Poplar Hill: M-NCPPC

II. Site-Specific Attributes		
<b>1. Baseline structural condition</b> a. Main building b. Outbuildings	Professional HSR / BCA (if possible)  Self-assessment (e.g. Preservation Brief #43)	Villa de Sales: Main house in need of roof repair; stable deteriorated  Piatt Castles: Mac-O-Chee significantly deteriorated
<b>2. Potential uses for structures</b> a. Main building b. Outbuildings	Self-assessment of spatial constraints, accessibility  Research on historical uses  Research on ADA requirements	Poplar Hill: Slave infirmary suitable for interpretation  Villa de Sales: Stable suitable for textile production
<b>3. Total acreage available</b> a. Agricultural b. Interpretive c. Events d. Mitigation	Professional consultation (if possible)  Local jurisdiction GIS data (e.g. soil, wetland overlays)	Piatt Castles: 30 acres available farmland  Poplar Hill: 70 acres available for mitigation
<b>4. Means of ingress/egress</b> a. Vehicle accessibility b. Surrounding roadways	Self-assessment with maps	Poplar Hill: Current driveway cannot accommodate buses  Villa de Sales: No permitted loads on MD 381
<b>5. Legal/zoning restrictions</b> a. Easements b. HP Ordinance	Deed research  Consultation with local government	Poplar Hill: Subject to PG County HP Ordinance  Villa de Sales: Subject to PG County HP Ordinance
III. Market and Partnership Landscape		
<b>1. Population at 5/10/50 miles</b>	<a href="#">Missouri Census Data Center</a>	Piatt Castles: 5,733 / 38,748 / 2,632,416
<b>2. Population concentration</b>	Self-assessment with maps	Villa de Sales: Concentrated in DC metro area
<b>3. Demographic characteristics</b> a. Household income b. Education c. Race/Nationality d. Age distribution	<a href="#">U.S. Census American Factfinder</a> <a href="#">Missouri Census Data Center</a>	Piatt Castles: Majority non-college graduates  Poplar Hill: 78% African-American within 5 miles  Villa de Sales: 34% of are families with children under 18
<b>4. Potential partner entities</b> a. Educational b. Nonprofit c. Local business d. Developers	Research / Outreach	Villa de Sales: P.A. Bowen Farmstead  Poplar Hill: GreenVest (mitigation banking firm)  Piatt Castles: Local Girl Scout organization

## Chapter 7: Recommendations and Conclusions

This paper has presented a set of considerations that could inform a reuse feasibility analysis for rural historic properties, based on both a review of literature in the areas of rural heritage conservation and preservation economics as well as data gathered from three case studies. While the information is intended for universal application among rural historic property owners, it is useful to illustrate how it might fit within the preservation regime of a particular local jurisdiction. As discussed in Chapter 3, Prince George's County, Maryland serves as a valuable test bed for new approaches to rural preservation because it has a large number of deteriorating historic properties and is facing continuous pressure from new development. While the County imposes a strong historic preservation ordinance in Subtitle 29 of the County Code, many property owners are woefully ill-equipped to meet its demands. It is hoped that the information presented in this paper could offer help in this regard.

### *Applicability of the Research to Prince George's County*

Providing reuse feasibility guidance to rural historic property owners could help the Prince George's County Historic Preservation Commission fulfill its charge under Subtitle 29. It is not clear exactly how this would fit within the existing responsibilities and operating procedures of the HPC, although the ordinance includes some general language that appears to accommodate the provision of reuse feasibility guidance to property owners. Specifically, Section 29-106 (a)(7) authorizes the Commission to "serve as a clearinghouse for information on historic preservation for County Government, individuals, citizens' associations, historical societies, and local

advisory committees; to *provide information and educational materials for the public*; and to undertake *activities to advance the goals of historic preservation in Prince George's County, Maryland*” (emphasis added).<sup>100</sup> Feasibility guidance seems to fall within “information and educational materials for the public,” and it clearly would help “advance the goals of historic preservation.”

Aside from its potential utility in assisting the Historic Preservation Commission fulfill its statutory charge, reuse feasibility guidance for rural historic property owners would help Prince George’s County preserve sites that embody the various “Heritage Themes” identified in the *Approved 2010 Historic Sites and Districts Plan*. Indeed, many of the sites noted as examples under each theme are rural properties that face either internal threats from inadequate investment or external threats from development. This is particularly true for the “17<sup>th</sup> Century” theme, which is intended to highlight the history of the county’s African-American population and its experience with slavery, as well as the “18<sup>th</sup> Century / Antebellum” theme, which focuses on the county’s agricultural heritage as embodied in its earliest plantations and the homes of planters and farmers. Rural and exurban sites are also noted as highlighting the heritage themes of commercial, industrial, and scientific advancements, political/social history, religion, recreation, and the arts, civil society, and ecclesiastical and residential architecture.<sup>101</sup>

The usefulness of reuse feasibility guidance for rural historic properties extends beyond Prince George’s County’s historic preservation regime. As just one example, the County’s Soil Conservation District is concerned with preserving

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<sup>100</sup> Prince George’s County Code, Subtitle 29, Section 106(a)(7), accessed at [www.municode.com](http://www.municode.com)

<sup>101</sup> Prince George's County Planning Department, *Approved 2010 Historic Sites and Districts Plan*, Upper Marlboro, Md.: Maryland-National Capital Park and Planning Commission, 2010.

agricultural land; this priority is clearly served by activities that help farm operators, including the owners of historic farmsteads, stay in business rather than selling their all or part of their property to developers. The Prince George's County Economic Development Corporation offers a wide range of services to small business owners and should be supportive of businesses operated on rural historic properties.

### ***Recommendations***

The Historic Preservation Section of the Prince George's County Planning Department, with support from the Historic Preservation Commission and the County Planning Board, should develop programs to disseminate reuse feasibility guidance to rural historic property owners. In order to align these programs with existing historic preservation policies, each should be responsive to one or more of the goals, policies and strategies enumerated in the *Approved 2010 Historic Sites and Districts Plan*. A list of Plan elements that provide a policy basis for the development and distribution of reuse feasibility guidance is provided in Appendix B.

New initiatives can be modeled on programs that already exist. One example is a series of public workshops, similar to those now conducted as part of the Historic Properties Grant Program. Each workshop in the series would cover a different component of the reuse feasibility guidance outlined in Chapter 6 and be led by a trained professional from a county agency, local business, or nonprofit group. The curriculum for the workshop series should cover the following subjects: building conditions assessment techniques; agricultural considerations, including climate, topography, and soil quality; zoning regulations and the County Historic Preservation Ordinance; basic market analysis using online resources and data from local and state

agencies; small business and nonprofit structures and their tax implications; small business planning, including the preparation of pro forma documents; financial incentives and funding opportunities available to historic sites from public and nonprofit sources at the county, state, and federal level; and conducting a personal skills assessment. Multiple subjects could be covered in a single workshop. All workshop materials, including video recordings, should be made available on the Historic Preservation Section website in order to increase their accessibility. Owners of designated Properties of Concern should actively be made aware of this guidance.

The Historic Preservation Commission and its staff should actively cultivate partners, both within and outside the Prince George's County government and the Maryland-National Capital Park and Planning Commission, which can assist in preparing and disseminating reuse feasibility guidance to rural historic property owners. Building condition assessment training could be provided by local restoration architects or faculty of the University of Maryland Historic Preservation Program. Information on farming could be provided by the Soil Conservation District, the Prince George's County Farm Bureau, or the University of Maryland Extension. State and local funding opportunities could be introduced in collaboration with the Maryland Historical Trust and Prince George's Heritage. Small business training could be provided by the Maryland Small Business Development Center at the University of Maryland-College Park.

The Historic Preservation Commission should also seek to identify and publicize rural historic sites that have implemented effective reuse programs that



generate onsite revenue. Historic Preservation Section staff or paid consultants should conduct case studies so that a body of best practices literature can be compiled.

### ***Conclusion***

It has been said that a local jurisdiction's preservation regime is only as strong as its local ordinance—this is true, but incomplete.<sup>102</sup> In fact, historic properties can only be preserved to the extent that their owners are able to comply with the ordinance, no matter its strength or weakness. Natural processes of deterioration are unconcerned with the enforceability of easements or the powers of an historic preservation commission to levy fines for noncompliance.

The often-fraught relationship between local historic preservation regulators and property owners could be improved through greater information sharing of the type suggested in this paper. Of course, no amount of preparation can anticipate all of the challenges inherent in owning a rural historic property, and as this paper has acknowledged repeatedly, there is no substitute for the counsel of trained professionals when considering new income-producing uses. However, providing property owners a basis for conducting their own reuse feasibility analysis will help them make better-informed decisions and could help jurisdictions such as Prince George's County advance their preservation agenda.

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<sup>102</sup> See "Protecting Resources in Ohio's Counties and Townships," Young Ohio Preservationists website, <http://www.heritageohio.org/yop/2016/04/09/protecting-resources-ohios-counties-townships/>; "In the State of Ohio historic preservation is only as strong as your local government," and Meghan MacWilliams, *A Case Study of Philadelphia's Preservation Policy: The Square Block of Chestnut, Walnut, Front and Second Streets*, Master's Thesis in Historic Preservation, University of Pennsylvania, 1999, p. 12: "The power of the (Philadelphia Historical Commission) is only as strong as Pennsylvania's state enabling power and the power of the Philadelphia Home Rule Charter."

## Appendix A: Case Study Questionnaire Responses

### 1. Poplar Hill on His Lordship's Kindness

1. In what year did you acquire the property? What were the circumstances by which it was acquired (e.g. arms-length purchase, inheritance, etc.)

**My parents acquired the property in 1955 for their own personal use as a residence and farm. My father, John M. Walton, Sr. donated the historic mansion and 7.26 acres of land to the John M. and Sara R. Walton Foundation, Inc. in 1995. The Foundation was bequeathed 126 additional acres through my father's will, when he died in 2000.**

2. What type of entity owns the property? (e.g. individual, LLC, nonprofit organization, etc.)

**The John M. and Sara R. Walton Foundation, Inc. is a 501(c)(3) nonprofit organization incorporated in the state of Maryland.**

3. Briefly describe the condition of the property at the time you became owner.

**The property was generally in good to very good condition.**

4. Please describe what income-producing activities you conduct (or have conducted in the past) on your property. In the case of more than one activity, please provide a breakdown of how much each activity contributes to the total income produced onsite (dollar figures may be provided but are not necessary; percentages are sufficient, e.g. 50% farm leasing; 25% event hosting, 25% tours)

**Horse Boarding – 54%**

**Rental of Two Single Family Homes – 43%**

**Rental of the Mansion for Special Events – 1%**

**Tours of the Mansion – 2%**

5. How did you determine which income-producing activities to pursue on your property? What site-specific factors were important in your thought process (e.g. available acreage, soil conditions, proximity to population centers, historical significance of the site)?

**Horse boarding and rental of the two single-family homes was started by Mr. and Mrs. John M. Walton, Sr. in the 1960's and had a proven track record of producing significant income.**

6. What outside resources or personal experiences were useful in determining the type(s) of income-producing activity that you have pursued on the property?

**My (John M. Walton, Jr.'s) 25-year long career in managing most of the historical properties owned by the M-NCPPC in Prince George's County was extremely useful.**

7. Did you request and/or receive any guidance regarding income-producing activities for historic properties, either from a public agency (local/state/federal) or other organization?

**No, not really - at least not directly.**

8. To what extent has onsite income been sufficient to meet the preservation needs of your property? (e.g. "onsite income has been sufficient to cover 50% of preservation-related expenses;" dollar figures are not necessary but may be included)

**Onsite income has been barely sufficient to meet the routine regular care and maintenance needs of the historic property, but totally insufficient to address or cover the cost(s) of its major maintenance and or preservation needs.**

9. During your period of ownership, would you say that the costs of restoring and maintaining your property have met, exceeded, or fallen short of your initial expectations?

**The costs of restoring and maintaining the historic property have exceeded our initial expectations.**

10. During your period of ownership, would you say that the income you have been able to produce on your property has met, exceeded, or fallen short of your initial expectations?

**The income we have been able to produce on the historic property has fallen short of our initial expectations.**

11. Is there any advice you would give to new historic property owners who are interested in producing income onsite?

**In general, my advice would be to explore the feasibility of as many compatible income producing activities as possible and to "think outside of the box."**

12. Going forward, how would you describe your goal(s) for the property you own?

**Our main goal at present is to re-establish and grow our investment fund (that virtually got wiped out in the stock market crash of 2008-2009) so that we can take care of the most pressing maintenance/preservation needs and open the historic property back up on a regular weekly public tour schedule and thus better fulfill our mission.**

## **2. The Piatt Castles**

1. In what year did you acquire the property? What were the circumstances by which it was acquired (e.g. arms-length purchase, inheritance, etc.)

**The inherited property was incorporated in the mid-1970s when I received some shares. More came to me from the deaths of my uncle in 1981 and my father in 1983.**

2. What type of entity owns the property? (e.g. individual, LLC, nonprofit organization, etc.)

**The property consists of 80 acres and two historic structures named Mac-A-Cheek and Mac-O-Chee. They exist as Piatt Castles Co. Inc. In 1994, a 501(c)(3) nonprofit organization was created to raise funds for research and programs at Piatt Castles.**

**In 1999, I purchased an early 20<sup>th</sup> century house adjacent to Mac-O-Chee. Our hope was that the MFH would raise enough funds to purchase the house which would become the offices and visitor services building. We intended to give Mac-O-Chee to the MFH and retain ownership of Mac-A-Cheek as a family home and part time museum.**

3. Briefly describe the condition of the property at the time you became owner.

**In the 1980s, Mac-O-Chee had serious restoration issues and both buildings had deferred maintenance needs. Many of the maintenance issues were addressed between 1984 and 2004. However since 2005 there has not been enough income to keep up with new maintenance issues let alone any of the restoration concerns. Consequently the condition of the property, especially Mac-O-Chee has deteriorated.**

4. Please describe what income-producing activities you conduct (or have conducted in the past) on your property. In the case of more than one activity, please provide a breakdown of how much each activity contributes to the total income produced onsite (dollar figures may be provided but are not necessary; percentages are sufficient, e.g. 50% farm leasing; 25% event hosting, 25% tours)

**Farm leasing – 3%**

**Interpretive tours – 95%**

**Gift Shop sales – 1 %**

**Property rentals – 1%**

**Public events have been funded through donations and grants from the MFH.**

5. How did you determine which income-producing activities to pursue on your property? What site-specific factors were important in your thought process (e.g.

available acreage, soil conditions, proximity to population centers, historical significance of the site)?

**Farming has been part of the family income on the site since 1828 and tour sales since 1912. My career as a museum educator for 30 years prior to returning to Ohio in 2002 demonstrated the potential of other endeavors. We had plenty of land to expand for endeavors such as conference center, quality gift shop and restaurant, education center and possible lodging for field studies. However, we did not have set-up money for any of these endeavors. Our real problems when the local schools cut funding for all field trips and the local chambers cut back on bus tours. We hit a time when cultural programming was not of interest or affordable in the counties surrounding our site.**

6. What outside resources or personal experiences were useful in determining the type(s) of income-producing activity that you have pursued on the property?

**Past experience in the museum field elsewhere helped us know what could be available. Initially, we joined state and regional organizations, worked on multi-county projects and collaborated with all other non-profit cultural and educational organizations in a two county region. We also joined local business organizations and Chambers of Commerce in three counties.**

7. Did you request and/or receive any guidance regarding income-producing activities for historic properties, either from a public agency (local/state/federal) or other organization?

**We have received guidance from Ohio Humanities (previous the Ohio Humanities Council) and we now intend to seek more help from Ohio Heritage and other regional and state organizations.**

8. To what extent has onsite income been sufficient to meet the preservation needs of your property? (e.g. "onsite income has been sufficient to cover 50% of preservation-related expenses;" dollar figures are not necessary but may be included)

**Income has not been at all sufficient. Consequently, family members took on part-time and full time jobs elsewhere and volunteered remaining time to the historic properties. This kept the sites going but gave little to expand income needed for any preservation needs.**

9. During your period of ownership, would you say that the costs of restoring and maintaining your property have met, exceeded, or fallen short of your initial expectations?

**Fallen short.**

10. During your period of ownership, would you say that the income you have been able to produce on your property has met, exceeded, or fallen short of your initial expectations?

**Fallen short.**

11. Is there any advice you would give to new historic property owners who are interested in producing income onsite?

**Make sure you have clear goals, seed money and a competent professional staff.**

12. Going forward, how would you describe your goal(s) for the property you own?

**We are planning to rent or sell our personal home and we would like to sell Mac-O-Chee to an individual or organization that will restore the building and use it for a purpose compatible to the site. We would prefer something that would help to promote interest in architecture, literature, history and the arts.**

**We then want to focus our resources on Mac-A-Chek for not only maintenance and restoration but also to we create publications and use technology to promote the history of tourism at the site.**

Note: The owner of Villa de Sales did not submit a written response to the questionnaire. Information was collected through an in-person interview.

## Appendix B: Relevant Elements in the Prince George's County *Approved 2010 Historic Sites and Districts Plan*

The elements of the *Approved 2010 Historic Sites and District Plan* listed below provide a policy basis for the development and distribution of reuse feasibility guidance to rural historic property owners.

### **Chapter 4: Preservation Planning**

Policy 3: Educate historic site owners and property owners within county historic districts about the regulations and incentives associated with the county's historic preservation program.

Strategy 1: Create and promote workshops, mailings, publications, and internet-based information on the Historic Preservation Commission's rules of procedure, policies, and guidelines and on the *Secretary of the Interior's Standards for the Treatment of Historic Properties* and best practices on issues affecting historic property owners.

\*\* This strategy is included in the *Plan's* list of "Highest Priority Actions."

Policy 4: Promote the rehabilitation of the county's historic resources through technical support to municipalities and community preservation organizations.

Strategy 3: Establish an internet-based preservation resource center with participation from M-NCPPC staff, consultants, contractors, educators, and other interested parties.

Policy 7: Enhance the historic preservation and cultural heritage content of the M-NCPPC web site.

Strategy 2: Expand M-NCPPC's web site to contain educational information and related links. M-NCPPC's web site could be linked to similar sites sponsored by county preservation organizations and could assist with queries regarding historic sites for county residents, potential residents, researchers, and interested parties.

### **Chapter 6: Environmental Settings**

Policy 1: Delineate an appropriate environmental setting at the time of historic site designation that protects the significant natural and cultural features of the property, including archaeological resources.

Strategy 3; Ensure that all significant features within the environmental setting of a historic site are protected through a best practices approach to resource conservation.

Policy 4: Develop incentives for preserving the environmental settings of historic sites when development is proposed.

Strategy 1. Consider legislation to provide tax credits and/or other financial incentives to encourage the conservation of significant natural and cultural features within environmental settings.

Strategy 2: Consider the development of a program to purchase or transfer development rights from environmental settings.

### **Chapter 10: Historic Preservation Incentives**

Policy 4: Provide incentives for maintaining the environmental setting around a historic site. This incentive could be provided through a property tax credit or through an agricultural tax assessment.

Strategy 2: Work with local elected officials to develop and pass county legislation to provide incentives for the maintenance of environmental settings around historic sites.

### **Chapter 12: Heritage Tourism**

Policy 1: Increase public and professional awareness of heritage tourism resources.

Strategy 1: Adopt an expansive approach to the definition of heritage resources that provides for flexibility and future development of heritage tourism opportunities.

Policy 3: Expand the use of current and emerging information technologies in all stages of heritage tourism development and promotion.

Strategy 4: Create a coordinated and comprehensive list of programs currently offered at museums and historic sites. Encourage collaboration between all heritage tourism sites in the county to keep web-based and print activity calendars current.

### **Chapter 13: Partnerships**

Policy 1: Maintain and strengthen existing preservation partnerships with county, state, and federal government agencies and organizations.



Strategy 1: Highlight select current preservation projects through a dedicated area on the M-NCPPC web site.

Strategy 2: Consider regularly nominating projects for award programs, such as awards from the National Trust for Historic Preservation and Preservation Maryland, to draw attention to the preservation program of Prince George's County.

Strategy 5: Continue to cosponsor and coordinate workshops with federal, state, and local historic preservation agencies and organizations to advocate and educate participants about appropriate preservation technology and techniques.

\*\* This strategy is included in the Plan's list of "Highest Priority Actions."

Policy 2: Encourage the formation of new partnerships to promote historic preservation and to expand and strengthen the historic preservation community.

Strategy 5. Promote collaborative efforts by conducting annual meetings with county government officials, municipal officials, chambers of commerce, the convention and visitor bureau, and/or other local officials to plan local activities and seek partnerships to complete them.

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