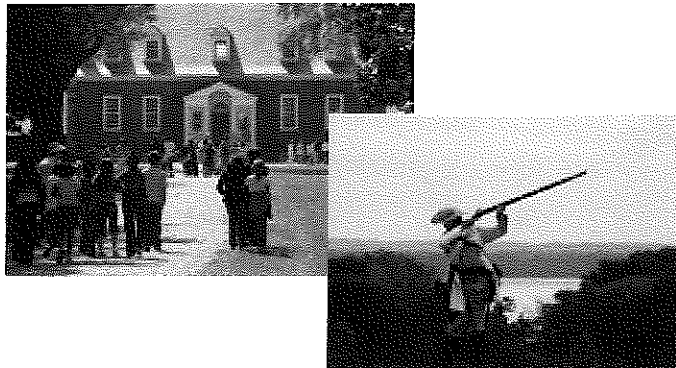


Gunston Hall Board of Visitors Report for 2011



Submitted May 2012 by the Gunston Hall Board of Visitors:
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EXECUTIVE SUMMARY

The Board of Visitors of Gunston Hall was established to examine and report to the Governor all proceedings of the Board of Regents and the manner in which they are managing and supervising Gunston Hall. The three members of the Board of Visitors are appointed by the Governor to one-year terms.

The Board of Visitors report focuses on proceedings at Gunston Hall during calendar year 2011. The report also includes information about Gunston Hall from previous years, as well as information external to Gunston Hall, to provide a comprehensive analysis.

Financial

The Board of Visitors does not have staff or resources to conduct financial audits. Our review of the latest available financial information about Gunston Hall, including the two-year state audit and the most recent independent auditor's report about the Board of Regents Fund did not identify any financial issues associated with the Board of Regents' management of Gunston Hall.

A review of funding at Gunston Hall during the last several years, especially with regard to capital improvements, indicates a continued and steady financial contribution by the Board of Regents and other private funding in contrast to reductions in General Fund allocations by the Commonwealth.

Evaluation of Personnel Issues, Visitation and the Education Mission

In 2011, the Board of Regents faced very vocal criticism following the suspension of the Education Coordinator position. This was followed by additional criticism including: management – employee and management – volunteer relations; complaints about poor morale among volunteers and paid staff; allegations that Gunston Hall's education mission has been diminished; complaints that visitation, including student visitation, is lower than in previous years; complaints about the elimination of weddings and other events; and, allegations of inadequate financial management.

On April 16, 2012, the Board of Regents announced a change in management at Gunston Hall with the appointment of Mark Whatford as acting director. In addition, "A Message From the First Regent" (**ATTACHMENT 13**) was distributed to local media and posted on the Gunston Hall web site in late April 2012. It outlines additional initiatives that are planned or already implemented by the Regents.

The Board of Visitors supports the Regents' decision to chart a new course for Gunston Hall. Our report includes several recommendations that can compliment and support the Regents' initiatives.

The Board of Visitors believes that addressing the challenges of 2011 can contribute to opportunities in the future. We look forward to a closer working relationship among the Board of Regents, the Board of Visitors and the Commonwealth, especially the Office of the Secretary of Education.

Gunston Hall Board of Visitors

Observations and Recommendations to the Governor Regarding the Board of Regents' Operation of Gunston Hall Plantation

I. **Gunston Hall Plantation, the Board of Regents and the Board of Visitors**

Gunston Hall Plantation in Mason Neck, Virginia was formerly owned by George Mason, author of the Virginia Declaration of Rights. It was conveyed to the Commonwealth of Virginia by Lewis Hertle through a Deed of Gift dated February 25, 1932, and was accepted by the Commonwealth of Virginia by an Act of the General Assembly approved March 15, 1932 (Chapter 138 Acts of General Assembly, 1932).

The Board of Regents

The Deed establishes the Board of Regents of Gunston Hall, comprised of members of the National Society of the Colonial Dames of America who are appointed by the Governor. The Board of Regents is to manage and supervise Gunston Hall as a memorial to George Mason in accordance with the provisions of the Deed of Gift.

By an Act of the General Assembly of Virginia approved March 10, 1948 (Chapter 175, Acts of Assembly of 1948), the Board of Regents was constituted a non-stock corporation under the name of "Board of Regents of Gunston Hall." The Corporation was authorized to "exercise such power and authority as is necessary and proper to accomplish the purpose for which the Board of Regents was appointed, including all the rights and powers conferred by the deed of gift."

The Act incorporating the Board in accordance with the deed of gift authorizes and directs the Corporation to "adopt bylaws for its organization, government and procedures, and (to) amend such bylaws from time to time as it may deem advisable."

The Board of Visitors

The Deed of Gift specified certain terms and conditions as to how the Plantation was to be maintained, managed and supervised. Included in the deed is the establishment of a Board of Visitors to be appointed annually by the Governor, "... with the ordinary powers of a Board of Visitors, whose duties shall be to visit that place to examine and faithfully report to the Governor all proceedings of said Board of Regents touching Gunston Hall and the manner in which they are managing and supervising the estate."

All three members of the Board of Visitors were reappointed by Governor McDonnell in November 2011.

II. Financial Reports

The Board of Visitors reviewed the following financial reports and notes their summary conclusions:

State audit of Gunston Hall financial records and operations for the years ended June 30, 2008 and June 30, 2009 (ATTACHMENT 1). This is the most recent completed state audit.

- The audit found proper recording and reporting of all transactions in all material respects, in the Commonwealth Accounting and Reporting System;
- No matters involving internal control and its operations necessary to bring to management's attention; and
- No instances of noncompliance with applicable laws and regulations or other matters that are required to be reported.

Independent Auditors' Report of the Gunston Hall Regents' Fund

The Gunston Hall Regents' Fund was incorporated October 29, 1982, to accept donations from Regents and other private sources to provide funding for the restoration and refurbishment of Gunston Hall. The Regents' Fund prepares its financial statements on the modified cash basis of accounting.

The audit of the Regents' Fund as of June 30, 2011 and 2010 is included as **ATTACHMENT 2**. The Board of Visitors provides no comment regarding the audit, other than to note the opinion of the auditors that the financial statements "...present fairly in all material respects, the assets, liabilities and net assets modified cash basis of Gunston Hall Regents Fund at June 30, 2011 and 2010, and its revenue, expenses and changes in net assets – modified cash basis and its cash flows – modified cash basis for the years then ended, in conformity with the basis of accounting described in Note 1."

III. Five-Year comparison: Commonwealth and Private Funding at Gunston Hall

At the request of the Board of Visitors, the former Director of Gunston Hall prepared the following table comparing Commonwealth and private funding (Note: Gunston Hall collects admission fees on behalf of the Commonwealth).

As the table indicates, the Commonwealth’s General Fund Allocation for Gunston Hall has declined during the last five fiscal years, while private sources of funding have increased.

Fiscal Year	0100 General Fund Allocation	0200 Admission Receipts	State Capital/ Maintenance Expenditures	Private Income*
FY 06-07	644,466	99,745	11,148	542,362
FY 07-08	740,001	111,506	84,209	521,053
FY 08-09	662,951	131,545	40,701	608,231
FY 09-10	582,478	123,874	23,145	699,873
FY 10-11	508,882	151,299	66,355	1,156,501

* Includes gifts, grants, Friends memberships and draws from the Gunston Hall Foundation.

Private income provided by the fundraising, grant applications and investments of the Gunston Hall Board of Regents is likely to become more important in anticipation of additional budget reductions by the Commonwealth.

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IV. Capital Projects and Improvements at Gunston Hall, 2005-2011 Commonwealth and Private Investment

- Construction of 10,000 square foot annex of the Ann Mason Visitor Center (\$1.5 million Commonwealth funding); fitting of Library and Collections Storage facilities with shelving, storage cabinets, racks, etc., and carpeting of 11 offices, hallways, etc. (\$177,254 private funding)
- Renovation of the vacated office facility in the Hertle Building – floor repair and replacement, plastering and repainting, electrical repair (\$34,885 private funding)
- Installation of courtyard garden in the expanded Ann Mason Building (\$32,477 private funding)
- Repair, restoration and repainting of wooden clapboard exteriors of six outbuildings in the historic kitchen yard (hearth kitchen, dairy, wash house, smokehouse, well, schoolhouse) (\$32,267 private funding)
- Re-roofing of six outbuildings with period correct wooden shingles (\$43,309 private funding) (\$12,705 maintenance reserve funds)
- Drilling of new potable water well and construction of new pump house for well and conduits serving four buildings (\$190,079 state) (\$39,622 private funding)
- Construction of new entrance gate (\$26,429 private funding)
- Installation of entrance signage (\$9,316 private funding)
- Construction of handicapped access lift on the east elevation of the Mansion; installation of new brick pathways for lift; relocation of utility lines for project and demolition of existing handicapped ramp (\$106,023 state) (\$23,488 private funding)
- Repair and restoration of wooden exteriors of three staff residences in historic area of plantation; painting of three residence exteriors (\$59,023 private funding)
- HVAC improvements – Re-fitting of propane-fueled system in the Ann Mason Building with new electric boiler and rebuilding of former service yard containing 800-gallon propane tank (\$57,000 private funding)
- Replacement of five oil-fueled furnaces in the Hertle Building, maintenance shops and residences public/private \$25,000
- Secured private funding to re-roof Gunston Hall Mansion and three residences (\$475,000 private grant)
- Ann Mason Building kitchen equipment repair and replacement (\$6,041 private funding)

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The following table highlights the comparison of Commonwealth and private funding of the capital projects and improvements at Gunston Hall:

Major Capital Projects and Improvements at Gunston Hall, 2005-2011

Project	State funding	Private funding	Combination
Construction of Ann Mason Annex	\$1,500,000	\$177,254	
Renovation of Hertle Office Facility		\$34,885	
Installation of Courtyard Garden		\$32,477	
Repair Six Wooden Outbuildings		\$32,267	
Re-roof Six Wooden Outbuildings	\$12,705	\$43,309	
New Potable Water Well	\$190,079	\$39,622	
New Entrance Gate		\$26,429	
New Entrance Signage		\$9,316	
Construction of Handicapped Access Lift	\$106,023	\$23,488	
Repair Exteriors of Three Residences		\$59,023	
HVAC Improvements		\$57,000	
Replacement of five furnaces			\$25,000
Re-Roof Mansion and Three Residences		\$475,000	
Replace Commercial Kitchen Equipment		\$6,041	
TOTAL	\$1,808,807	\$1,016,111	\$25,000

Summary: Significant capital projects and improvements at Gunston Hall have been completed due to the partnership between the Commonwealth and the Board of Regents.

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V. Evaluation of Relationships Among Management, Employees, Volunteers and External Stakeholders at Gunston Hall

Before the Board of Regents April 16th announcement about the appointment of an acting director, members of the Board of Visitors had spoken with or received written information from the former director, members of the Board of Regents, and current and former employees and volunteers at Gunston Hall. As a result of this communication and our own review, we believe there are several steps that can be taken to improve relationships among management, employees, volunteers and external stakeholders.

State Employees at Gunston Hall

The state employees at Gunston Hall can exercise certain rights especially with regard to addressing grievances with management. In fact, there are grievance procedures available to them through the Department of Employee Dispute Resolution. The Department's web site is:

www.edr.virginia.gov

The Department of Employee Dispute Resolution offers a confidential, toll-free phone line with guidance about resolving workplace conflict, as well as information about the rights and responsibilities of employees and agency management. The Department offers a workplace mediation program, and a grievance procedure to bring work-related concerns to upper-level management.

Information about the grievance procedure is available from EDR consultants via the toll-free "Advice Line" and at EDR's website, including copies of the *Grievance Procedure Manual*.

The above information is found at the EDR website under "Ways to Resolve Workplace Disputes," at the following link: http://www.edr.virginia.gov/gpm_one.htm#5

Recommendation – State Employees

The Board of Visitors recommends that the Board of Regents arrange for a representative from the appropriate state agency in charge of human resource issues for state employees at Gunston Hall, and a representative of the Virginia Department of Employment Dispute Resolution meet with employees at Gunston Hall before the end of 2012. The objective is to make sure employees can identify a point of contact for human resource issues and understand their rights and responsibilities regarding complaints or grievances. These representatives also can monitor working conditions at Gunston Hall, including teamwork and morale.

Note: See ATTACHMENT 13, "Employee Resources," regarding the Board of Regents' development of employee handbooks.

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Recommendation – State Employee Grievance Procedure

EDR administers the grievance procedure under which most workplace disputes can be grieved to three successive levels of agency management. An employee may ask EDR to investigate allegations of retaliation as the result of the use of or participation in the grievance procedure. Where EDR determines that the request merits further review, EDR's authority is limited to investigating the complaint and advising the agency head of its findings.

In order to address any concerns about possible retaliation, The Board of Visitors recommends that the Board of Regents and the Secretary of Education work with EDR and agree to a procedure to ensure that any future EDR findings be transmitted to the Secretary of Education as well as to the Director.

Recommendation – Training

The Department of Employment Dispute Resolution offers a variety of training options in conflict management skills and the grievance procedure for all supervisors and employees at no charge. The Board of Visitors recommends that the Board of Regents arrange for the next Director and any employee who is responsible for employee/volunteer relations at Gunston Hall complete these training sessions. If possible, the Board of Visitors suggests that a member of the Regents' Executive Committee or the Regents' committee responsible for employees at Gunston Hall be invited to take the on-line version of the training in order to understand the Commonwealth's expectations regarding conflict resolution and grievance procedures.

Recommendation – Management of Employees, Volunteers and External Relations

The Board of Visitors also recommends that together, the Commonwealth and the Board of Regents review the Director's job description and performance plan with regard to best practices in the management and supervision of full and part-time employees and volunteers as well as external stakeholders.

The Board of Visitors recommends that the Board of Regents include 360-degree evaluations of the Director position as a baseline of performance, especially with regard to management and relationships with employees, volunteers and external stakeholders.

It should be clear from our recommendations that management-employee/volunteer relations can be improved. The improvements can be measured by performance reviews as well as surveys of employees, volunteers and external stakeholders.

VI. The Education Mission at Gunston Hall

There has been vocal criticism of the former Director and the Board of Regents regarding the education mission at Gunston Hall. The criticism has included complaints about the curtailment or reduction of certain programs and the impact to the education mission at Gunston Hall. Critics also say student visitation has declined during the tenure of the former Director.

The Board of Visitors acknowledges that several programs have been reduced or curtailed during the last several years, and this warrants further review.

Recommendation - The Director of Educational Programming Position

The First Regent of the Gunston Hall Board of Regents has stated the Regents' intention to recruit a Director of Educational Programming (**ATTACHMENT 13**) instead of the previous education coordinator position, to obtain an advanced level of educational programming.

The Board of Visitors endorses the Board of Regents' decision to establish the Director of Educational Programming position and recommends the following actions by the Board of Regents:

- ***The job description for the Director of Educational Programming can reflect the requirement of current skill sets such as increased use of technology***
- ***The job description can ensure that the Director of Educational Programming is able to develop measurable strategies for educating people of all ages and demographics about the contributions of George Mason***
- ***The job description can reflect future goals and priorities of the education mission***
- ***The job description of the Director of Educational Programming can reflect input from the Secretary of Education***

The Board of Visitors recommends that the recruitment and hiring of the Director of Educational Programming should occur after the hiring of a new Director for Gunston Hall. We believe the new Director should participate in the recruitment and hiring of the Educational Programming Director.

Education Programming at Gunston Hall

In a response to public criticism, the former Director provided the following comments regarding Gunston Hall's education programs in a statement published in the January 27, 2011 *Lorton Patch* (**ATTACHMENT 3**):

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- *Despite the termination of an education staff member, Gunston Hall will conduct all scheduled school tours and all events and programs scheduled for 2011. The staff and members of the Gunston Hall Docents Association have confirmed their commitment to present these tours and programs to the public.*
- *Gunston Hall will expend \$241,201 on education and Interpretive staff salaries, public tours and programs and other educational support in fiscal year 2010-2011. The Commonwealth will provide approximately 60% of those funds; the remainder is provided by the Friends of Gunston Hall and private grants given in response to requests issued by the Director and the Development Officer.*

The former Director also sent a letter dated April 1, 2011 (**ATTACHMENT 4**) to Senator Toddy Puller, Delegate David Albo, Delegate Scott Surovell and former Secretary of Education Gerard Robinson with an update about educational activity during 2011.

The following link to the Gunston Hall website provides information about education programs including field trips and teacher resources during 2011:

<http://www.gunstonhall.org/education/index.html>

Some of the information is provided as **ATTACHMENTS 5 and 6** (Field Trips and Teacher Resources).

Student Visitation

There are complaints about a reduction in student visitation during the former Director's tenure. A review of available information suggests student visitation has fluctuated over the years. For example, in Fiscal Year 2000 – 2001 (before the former Director was hired), student visitation was recorded at 8,015 (**ATTACHMENT 7**). The lower student visitation in Fiscal Year 2000 – 2001 occurred despite higher overall visitation at Gunston Hall.

In Fiscal Year 2003 – 2004 (after the former Director was hired), student visitation was recorded at 6,218.

In Fiscal Year 2010 – 2011, student visits to Gunston Hall numbered 9,305 (Gunston Hall 2010 – 2011 Year End Report, **ATTACHMENT 8**).

This information is included to provide context to the discussion about student visitation. It is not to suggest a continued upward trend in student visitation going forward. The Board of Visitors recognizes the need for continued review of student visitation and other aspects of education programming at Gunston Hall.

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It is extremely important to affirm the quality and viability of education programming at Gunston Hall. The Board of Visitors believes our recommendations for a new committee will serve that purpose.

Recommendation – Create an Advisory Committee on Education

The Board of Visitors recommends that the Board of Regents create an Advisory Committee on Education to focus specifically on the education mission at Gunston Hall. Committee membership should include representatives of the Office of the Secretary of Education, the Board of Regents, local educational organizations, Gunston Hall staff and a representative of the volunteers.

- ***In addition to providing helpful guidance regarding the education mission, an advisory committee could increase awareness and participation among regional K-12 and post-secondary educational institutions.***

The Board of Visitors recommends that the advisory committee on education should be created after the hiring of a new Director and the Director of Educational Programming.

Note: See ATTACHMENT 13, “Educational Advisory Board,” regarding the Board of Regents’ support for an education advisory committee.

Observations Regarding the Education Mission at Gunston Hall

The Education Advisory Committee for Gunston Hall will have an important mission with regard to trends in education programming. For example, consider the changing status of school field trips:

An article in the January 2010 edition of *Museum Magazine*, published by the American Association of Museums is entitled “What Teachers Want From Field Trips” (**ATTACHMENT 9**). It highlights a field trip to Gunston Hall by fourth-graders at Mosby Woods Elementary School in Fairfax County.

According to the article’s author:

“For teachers across the country, museum field trips are essential tools in creating vibrant, memorable lessons. But as school budgets tighten and educators face increasing pressure to tailor their lessons to standardized tests, that kind of hands-on real-life educational experience may be endangered. Sort of like trans-Atlantic travel on the RMS Queen Mary – it sounds lovely of course. But do we really have the time? Or the money? The answer is yes. Field trips shouldn’t be considered luxury travel. But educators from California to Connecticut say the future of these learning adventures really depends on whether a museum experience can offer the focused educational experience they need.”

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Other issues for consideration:

- What are the opportunities for distance learning and increased use of technology (Classroom video conferences, “smart phone” apps, etc.)?
- What are the opportunities for educational partnerships with non-profit organizations and corporations?
- What is the impact of demographic trends on the educational value of Gunston Hall education programs?
- Can the Gunston Hall Docent Association increase the number of docent trips to schools? This number appears to have declined over several years. *

*The Gunston Hall Docent Association is a separate and independent 501 c (3) organization with its own structure, bylaws and budget. The members of the organization do not take direction from the Board of Regents.

Note: See **ATTACHMENT 13** regarding the Board of Regents’ initiatives to increase field trips, onsite education and outreach to schools.

VII. Recommendations Regarding a General Advisory Committee

Meetings of the previous Board of Advisors were discontinued at Gunston Hall in 2011. The committee had served at the invitation of the First Regent. It is our understanding that the committee had no mission statement or procedural rules and produced no written reports.

The Board of Regents is replacing the Board of Advisors with an advisory committee. Individuals on the committee will have a variety of pertinent experience, including history, preservation, historic site or museum management and legislative expertise. A member of the local community also would be represented on the committee (**ATTACHMENT 13**).

*The Board of Visitors supports the Regents’ proposals for a general advisory committee. In addition to subject matter experts referenced in ATTACHMENT 13, we recommend the advisory committee include a professional in marketing and communications. ***

****See the Board of Visitors recommendations regarding visitation, events and marketing under Article X.**

VIII. Long-Range Planning

There are two established formats for long-range planning at Gunston Hall:

- The Board of Regents Five-year Plan
- The Commonwealth's Two-year Agency Strategy Plan

The Board of Regents develops and works to implement a five-year plan. The Regents conduct an annual review and update of their plan.

The Commonwealth's **Strategic and Service Area Plan for 2010 – 2012** can be found at the following link on the Gunston Hall web site:

<http://vaperforms.virginia.gov/agencylevel/stratplan/spReport.cfm?AgencyCode=417>

Recommendation – Annual written update of long-range plan

The Board of Visitors recommends that the Board of Regents provide a summary of the annual update of the Long-Range plan on the Gunston Hall web site. The summary of the annual update can be included in the Regents' annual report which is posted on the Gunston Hall web site. This will help identify revisions to goals and objectives in the Regents' long-range planning.

Recommendation – Increased Regents' engagement with Commonwealth stakeholders

The Board of Visitors recommends that the Board of Regents meet annually with the appropriate departments or agencies of the Commonwealth government to review and align the Regents' Long-Range Plan with the Commonwealth's Agency Strategic Plan for Gunston Hall. The results of the review can be included in the annual report of the Regents' Long-Range Plan.

IX. Transparency and Communication

Improved relationships among Gunston Hall management, Regents, employees, volunteers and external stakeholders require additional communication and transparency. Gunston Hall's web site provides an excellent opportunity to improve the public's understanding of the various parties' roles and responsibilities.

Web site improvements

The Board of Visitors is pleased to note that the Board of Regents has established links on the Gunston Hall web site to the following documents:

- *Gunston Hall Year End Report*
- *The Commonwealth's Strategic and Service Area Plans for Gunston Hall*
- *Gunston Hall Expenditures*
- *The annual audit of the Regents' Fund*
- *A link to information about IRS Form 990 for Gunston Hall*

The Board of Visitors recommends including a link to the Commonwealth's two-year audit of Gunston Hall.

Recommendation – Additional communication

The Board of Visitors recommends that the Board of Regents investigate ways to increase communication to external stakeholders and interested citizens through, for example, a periodic newsletter and increased use of social media.

The Boxwoods: A Case Study of the Need for Transparency and Communication

The boxwoods line the approach from the river to the mansion. They were trimmed regularly between 2003 and 2006. This prompted vocal criticism of the former Director and the Board of Regents by some members of the general public and in particular, members of the Mason Neck community.

What appears to have been missing was a thorough explanation about the reasons for trimming the boxwoods:

According to the 2001 American Association of Museums accreditation report for Gunston Hall (**ATTACHMENT 10**), "Overgrown boxwoods dominate the approach to the mansion from the river and obscure the original design. The boxwoods are more than six feet tall and cover an extensive area, reducing Mr. Mason's broad avenue leading to the mansion to a path three or four feet wide.

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Recent archaeological investigation has discovered that the original planting border corresponded to the width of the central passage of the mansion.

Planted by George Mason, the boxwood allée has disappeared in the spread and regeneration of the original plants. The dilemma is whether to remove the original plants and restore the landscape installed by Mr. Mason.”

The report said the options included restoring George Mason’s original landscape plan or allowing the boxwood maze to continue to grow and spread.

An earlier version of the Board of Regents’ Long Range Plan for 2008 – 2013 indicated their support for “judicious pruning” of the boxwoods in order to restore the historic integrity of the landscape.

A decision to restore or maintain the original landscape and vegetation at a historic site is not unique to Gunston Hall. A similar initiative was undertaken at George Washington’s Mt. Vernon Estates.

The Spring 2011 edition of the publication, *Mount Vernon: Yesterday, Today, Tomorrow* (**ATTACHMENT 11**) reported the removal and replanting of George Washington’s famous garden:

“As much as we loved the garden walks, the massive boxwood plantings, and the arrangement of the flowers,” noted Dean Norton, longtime horticulturalist, “we had to remain true to George Washington and his designs.”

The article also noted that new boxwoods would be installed and kept low to 18th-century specifications.

The Board of Visitors believes this example highlights the need for effective and timely communication with stakeholders. Whether it is the decision to trim the boxwoods, discontinue the farm animal exhibit or curtail certain education programs, it is important to communicate the reasons for change.

X. Visitation, Events and Marketing Gunston Hall

Marketing Gunston Hall

The 2001 AAM accreditation report (**ATTACHMENT 10**) includes the following observation about marketing Gunston Hall:

“The dilemma is how to make the public *care* about George Mason – how to brand Mason and his Plantation.”

The Board of Visitors believes the same challenge exists today. In addition, there is significant competition for visitation and events from historic and arts-oriented venues. It also is important to account for new trends in museum visitation, such as changing demographics and new uses of technology. The current economy also impacts museum visitation. As a result, the Board of Visitors offers the following recommendation:

Recommendation – Marketing Study

The Board of Visitors recommends that the Board of Regents authorize a professional marketing study to determine the best way to brand and market Gunston Hall. The study also should provide a realistic assessment about visitation goals as well as expectations for return on investment from marketing outreach.

The Board of Visitors suggests that a marketing charrette may be helpful as part of a professional marketing study. The charrette could contribute to the vision and direction of marketing and outreach. Participation in the charrette could include representatives from:

- ***Visit Fairfax***
- ***The Virginia Tourism Corporation***
- ***Chambers of Commerce***
- ***American Association of Museums***

Visitation – A Perspective

According to the American Association of Museums 2009 Museum Financial Information Survey (**ATTACHMENT 12**), the median annual attendance for a historic house/site was 11,700.

Gunston Hall’s overall visitation in 2010 – 2011 was 25,060. (See Gunston Hall 2010 – 2011 Year End Report, **ATTACHMENT 8**).

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The issue of declining visitation was identified before the former Director was hired in 2003. In the 2001 accreditation report for Gunston Hall by the American Association of Museums (**ATTACHMENT 10**), the report states:

“Attendance has been flat or declining for the past decade. Actual attendance was 47,946 in 1990 and 40,198 in 2000.”

An informal telephone survey by the Board of Visitors found visitation numbers for 2010 that are similar to Gunston Hall at comparable historic sites:

Gunston Hall, Mason Neck, VA (www.gunstonhall.org)

- Visitation – 2010 – 2011: 25,060
- No information on web site about private rentals. Year-end report indicates portions of the facility were rented for several programs with an educational purpose.

The George Washington Foundation, Fredericksburg, VA
(Kenmore and Ferry Farm, www.kenmore.org)

- Visitation – 2010: 26,000
- Private events are not allowed at either site

Poplar Forest, Forest, VA (www.poplarforest.org/main)

- Visitation – 2010: 26,7000
- Private events allowed. Rate for for-profit entities or personal events such as weddings is \$4,000. Success as a revenue generator is unclear.

Stratford Hall, Montross, VA (<http://www.stratfordhall.org>)

- Visitation – 2010: 27,000 – 30,000
- Weddings, private events, corporate retreats
- 21 overnight accommodations
- Rental operation does not always make money; More competition from Virginia wineries for weddings

Woodlawn Plantation, Alexandria, VA (<http://woodlawn1805.org>)

- Closed for renovations until at least 2013
- Weddings and other events. Current format not profitable.
- Now partnering with sustainable farming initiative (www.arcadiafood.org)

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River Farm, Alexandria, VA (www.ahs.org/river_farm/index.htm)

- Visitation – Not a key measure for the site
- Headquarters of the American Horticultural Society
- Weddings, receptions, meetings, retreats

Events at Gunston Hall and Competition With Other Sites

When considering the possibility and value of increasing the number of private events at Gunston Hall, the Board of Visitors suggests three criteria:

- Marketing resources: What resources are necessary to reach target markets for particular events
- Staffing: The need for a marketing and event professional
- Cost: Accounting for all costs of marketing and event management when determining budget and return on investment

Income and Expenses Associated with Catering and Events at Gunston Hall

The Board of Visitors suggests that the Regents prepare a review of income and expenses associated with catering and events at Gunston Hall.

There are several historic and arts-oriented venues in proximity to Gunston Hall that offer facilities, and in some cases, personnel or catering for events (Note: Information is summarized from web sites. Some sites with an Alexandria address are in Fairfax County):

Gadsby's Tavern Museum

134 N. Royal Street

Alexandria, VA

Weddings, meetings and professional events

<http://alexandriava.gov/GadsbysTavern>

The Lyceum

201 S. Washington Street

Alexandria, VA

Weddings, meetings, receptions, concerts

<http://alexandriava.gov/Lyceum>

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Carlyle House

121 N. Fairfax Street

Alexandria, VA

Weddings, receptions, business receptions, events by non-profits

[http://www.nvrpa.org/park/carlyle house historic park](http://www.nvrpa.org/park/carlyle_house_historic_park)

Collingwood Library and Museum

8301 East Boulevard Drive

Alexandria, VA

Weddings, receptions, outdoor events, conference center for meetings and events

<http://www.collingwoodlibrary.com>

River Farm

7931 East Boulevard Drive

Alexandria, VA

Weddings, receptions, meetings, retreats, corporate dinners

http://www.ahs.org/river_farm/index.htm

Lee-Fendall House Museum

614 Oronoco Street

Alexandria, VA

Weddings, receptions, corporate retreats, dinner parties

<http://www.leefendallhouse.org/>

Torpedo Factory Art Center

105 N. Union Street

Alexandria, VA

Can accommodate events for 50 – 850 people

220 for seated event with tables

Theatre seating for groups of up to 350

<http://www.torpedofactory.org/>

Workhouse Arts Center

9601 Ox Road

Lorton, VA

Weddings, receptions, reunions, other social or business events

Gallery Building can accommodate:

- 160 people for standing reception (1st Floor)
- Up to 200 for a standing reception or a seated dinner (2nd Floor)

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- Outdoor events

New construction includes 35,000 square foot performing arts center

<http://www.lortonarts.org/>

Mt. Vernon Estates

Mt. Vernon, VA

Event Facilities

- East Lawn: Capacities = 1,200
- Donald W. Reynolds Museum and Education Center: Capacities = 100 (Seated) and 300+ (Standing)
- Ford Orientation Center: Capacities = 300 (Seated) and 400+ (Standing)
- Mt. Vernon Inn and Restaurant (Adjacent to the Mansion): Daytime or evening events
- George Washington's Distillery and Gristmill (Three miles from the Estate): Capacities = 60 (Indoor) and 250 (Tented)

<http://www.mountvernon.org/>

Final Observations

The Board of Visitors report highlights some of the challenges that are external to Gunston Hall, such as reductions in government funding, reduced budgets for school field trips, increased competition for visitation and events at historic sites, and demographic and generational changes that may require new approaches to attract visitors. We believe the partnership between the Board of Regents and the Commonwealth (as represented by the Secretary of Education) is fundamental to meeting these challenges.

The Board of Regents is taking important steps to support the mission and vision of Gunston Hall by recruiting new leadership to the historic plantation. Already, there has been increased communication among the Office of the Secretary of Education, the Board of Visitors and the Regents. We anticipate additional initiatives by the Regents to improve communication with stakeholders and provide new focus to the education mission while planning for the next generation of visitors to Gunston Hall.

End of Report

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MUSEUM HIGHLIGHTS

Gunston Hall is a 550-acre national historic landmark, and the former home of George Mason. Gunston Hall promotes and educates the public about 18th century life, as well as the historical significance and contributions of its owners.

Gunston Hall has affiliations with the Gunston Hall Regents Fund and the Gunston Hall Foundation, two independently incorporated entities that exist for the sole purpose of soliciting, receiving, investing, and managing private donations for Gunston Hall. Gunston Hall also has a separate account for the purpose of acquiring objects for the museum collection that is not in the Commonwealth's accounting system.

FINANCIAL HIGHLIGHTS

While most of Gunston Hall's expenses are for operations, there were some minor capital expenses during the audit period. The chart below includes the final budget and expense information for the years under review.

<u>Analysis of Capital Budget and Actual Expenses</u>			
2009		2008	
<u>Final Budget</u>	<u>Expenses</u>	<u>Final Budget</u>	<u>Expenses</u>
\$199,343	\$40,702	\$304,390	\$84,209

To help offset statewide budget reductions in 2009, the Department of Planning and Budget allowed Gunston Hall to supplement some of their operational funding with maintenance reserve funding. Gunston Hall's budget reduction was about \$96,000, and this reduction is the main reason for the budget variance from 2008 to 2009 shown above.

The majority of Gunston Hall's funding comes from General Fund appropriations. They also collect admission fees and private donations, as well as some funding from the Gunston Hall Foundation. The following chart shows the original and final operating budgets, as well as actual expenses for fiscal years 2008 and 2009.

	<u>Analysis of Operating Budget and Actual Expenses by Fund</u>					
	2009			2008		
	<u>Original Budget</u>	<u>Final Budget</u>	<u>Expenses</u>	<u>Original Budget</u>	<u>Final Budget</u>	<u>Expenses</u>
General Fund	\$ 645,587	\$ 662,951	\$662,950	\$ 735,585	\$ 749,686	\$739,999
Special Revenue	359,103	359,103	143,771	349,859	349,859	76,950
Total	<u>\$1,004,690</u>	<u>\$1,022,054</u>	<u>\$806,721</u>	<u>\$1,085,174</u>	<u>\$1,099,275</u>	<u>\$816,589</u>

Gunston Hall's original budget decreased in 2009 from their 2008 original budget due to the removal of \$95,000 in general funds for one-time equipment funding. As part of statewide budget reductions in 2009, Gunston Hall had an additional General Fund operating budget reduction of more than \$96,000 during fiscal year 2009, but used their capital maintenance reserve to offset this reduction as previously discussed.

Historically, Gunston Hall has budgeted its special revenue to include admissions, donations, and other miscellaneous income sources as 30 percent of its anticipated overall operating funds. As a result, the

special revenue fund budget in the table above is consistently more than actual expenses, because Gunston Hall has not achieved this goal.

To generate more funding, they have raised the admission prices and targeted additional potential visitors. They have also appealed to their Board for additional private funds. Even with these strategies, Gunston Hall did not generate the funds sufficient to meet the thirty percent goal. To further conserve special revenue fund cash balances in consideration of other budget reductions, Gunston Hall has reduced its special revenue fund spending to conserve its cash balance due to further cuts in General Fund appropriations.

Gunston Hall's operating expenses are primarily for salaries and personnel costs for six full-time and 24 part-time employees. Gunston Hall has not filled about half of their authorized full-time positions due to funding constraints, and will not be able to fill these vacancies in the near future due to budget reductions. The remaining operating expenses are for contractual obligations and other ongoing operating expenses. For fiscal years 2008 and 2009, Gunston Hall also had approximately \$125,000 in capital project expenses, which are not in the operating funds above.

Gunston Hall expects that their funding challenges will continue over the next several years; further General Fund reductions are already included in the budget for fiscal years 2011 and 2012. Gunston Hall has approximately \$124,000 in non-general fund cash balances that it plans to use to help offset the General Fund reductions. As they use up this balance, they will become more reliant on funds from their Foundation and other private sources. The following table shows the proposed budget for fiscal years 2010, 2011 and 2012.

Summary of Proposed Budget for Fiscal Years 2010 - 2012

	<u>2010</u>	<u>2011</u>	<u>2012</u>
General Fund	\$494,411	\$489,039	\$489,039
Special Revenue Fund	<u>232,949</u>	<u>264,699</u>	<u>264,699</u>
Total	<u>\$727,360</u>	<u>\$753,738</u>	<u>\$753,738</u>



Commonwealth of Virginia

Auditor of Public Accounts
P.O. Box 1295
Richmond, Virginia 23218

Walter J. Kucharski, Auditor

May 10, 2010

The Honorable Robert F. McDonnell
Governor of Virginia

The Honorable Charles J. Colgan
Chairman, Joint Legislative Audit
and Review Commission

We have audited the financial records and operations of **Gunston Hall** for the years ended June 30, 2008 and June 30, 2009. We conducted this performance audit in accordance with generally accepted government auditing standards. Those standards require that we plan and perform the audit to obtain sufficient, appropriate evidence to provide a reasonable basis for our findings and conclusions based on our audit objectives. We believe that the evidence obtained provides a reasonable basis for our findings and conclusions based on our audit objectives.

Audit Objectives

Our audit's primary objectives were to evaluate the accuracy of recorded financial transactions in the Commonwealth Accounting and Reporting System, review the adequacy of Gunston Hall's internal controls, and test compliance with applicable laws and regulations, and review corrective actions of audit findings from prior year reports.

Audit Scope and Methodology

Gunston Hall's management is responsible for establishing and maintaining internal control and complying with applicable laws and regulations. Internal control is a process designed to provide reasonable, but not absolute, assurance regarding the reliability of financial reporting, effectiveness and efficiency of operations, and compliance with applicable laws and regulations.

We gained an understanding of the overall internal controls, both automated and manual, sufficient to plan the audit. We considered significance and risk in determining the nature and extent of our audit procedures. Our review encompassed controls over the following significant cycles, classes of transactions, and account balances.

- Contractual services expenses
- Payroll expenses
- Appropriations
- Cash receipting and collections of accounts receivable
- Capital assets
- Information Security

We performed audit tests to determine whether Gunston Hall's controls were adequate, had been placed in operation, and were being followed. Our audit also included tests of compliance with provisions of applicable laws and regulations. Our audit procedures included inquiries of appropriate personnel, inspection of documents, records, and contracts, and observation of the Gunston Hall's operations. We tested transactions and performed analytical procedures, including budgetary and trend analyses.

Conclusions

We found that Gunston Hall properly stated, in all material respects, the amounts recorded and reported in the Commonwealth Accounting and Reporting System. Gunston Hall records its financial transactions on the cash basis of accounting, which is a comprehensive basis of accounting other than accounting principles generally accepted in the United States of America. The financial information presented in this report came directly from the Commonwealth Accounting and Reporting System.

We noted no matters involving internal control and its operation that we consider necessary to be reported to management. The results of our tests of compliance with applicable laws and regulations disclosed no instances of noncompliance or other matters that are required to be reported under Government Auditing Standards.

Gunston Hall has taken adequate corrective action with respect to audit findings reported in the prior year.

Exit Conference and Report Distribution

We discussed this report with management on May 7, 2010.

This report is intended for the information and use of the Governor and General Assembly, management, and the citizens of the Commonwealth of Virginia and is a public record.


AUDITOR OF PUBLIC ACCOUNTS

DEM/alh

GUNSTON HALL OFFICIALS
AS OF JUNE 30, 2009

GUNSTON HALL

Mr. David L. Reese
Director

GUNSTON HALL BOARD OF REGENTS

Mrs. Price Gripekoven, President of the National Society
Mrs. Rayfield Weedon, President of the Virginia Society
Mrs. Peter D. Humleker, Jr. Honorary Regent
Ms. Priscilla Brewster, First Regent
Mrs. James Martin Macnish, Jr., Vice Regent

Mrs. Gilbert Warwick Anderson
Mrs. Anderton Lewis Bentley, Jr.
Mrs. William Allan Blodgett
Mrs. Joseph C. Bossong
Mrs. Anderton Lewis Bentley, Jr.
Mrs. William B. Blaylock
Mrs. William Allan Blodgett
Ms. Angela Pringos Box
Mrs. William H. Buchanan, Jr.
Mrs. Theodore Jack Craddock
Mrs. Timothy George Dargan
Mrs. Bruce E. Dines
Ms. Steven Wayne Duff
Mrs. Richard M. Dunlap
Mrs. David Wendel Foerster
Mrs. Raymond Dale Hardesty
Mrs. Harry Leonard Hatton
Mrs. Steven A. Holland
Mrs. Jesse Bounds Horst
Mrs. Rodney R. Ingham
Mrs. John A. Jenkins
Mrs. John P. Kennedy

Mrs. Walker Kennedy, Jr.
Mrs. Max M. Levy
Ms. Elizabeth Jane Lilley
Mrs. Marshall George Linn, III
Dr. Elizabeth Hughes Locke
Mrs. Phillip Jewett Markert
Mrs. Frederick W. Martin
Mrs. Thomas Hooke McCallie, III
Mrs. Hugh A. Merrill
Mrs. Donald James Nalty
Mrs. James T. Norman
Mrs. Richard Marshall Norton
Mrs. James Lee Osborne
Mrs. Henry R. Raab
Mrs. Polly Reynolds Savage
Ms. Jacque-Lynne A. Schulman
Mrs. Chris Smith
Mrs. John Van Allen
Ms. Beatrice Stephens Vann
Ms. Benjamin Sims Willard
Mrs. John Lane Wood
Mrs. Mary Brooks Woodbridge

BOARD OF VISITORS

Dr. Rosier D. Dedwylder, II
Ms. Penelope Payne
Mr. Timothy J. Sargeant

AUDIT SUMMARY

Our audit of Gunston Hall, found:

- proper recording and reporting of all transactions, in all material respects, in the Commonwealth Accounting and Reporting System;
- no matters involving internal control and its operations necessary to bring to management's attention; and
- no instances of noncompliance with applicable laws and regulations or other matters that are required to be reported.

WATKINS | MEEGAN

October 20, 2011

To the Board of Regents
Gunston Hall Regents Fund
Mason Neck, VA 22079

In planning and performing our audit of the financial statements of Gunston Hall Regents Fund (the Regents Fund) as of and for the year ended June 30, 2011, in accordance with auditing standards generally accepted in the United States of America, we considered the Regents Fund's internal control over financial reporting (internal control) as a basis for designing our auditing procedures for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Regents Fund's internal control. Accordingly, we do not express an opinion on the effectiveness of Regents Fund's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct misstatements on a timely basis. A *material weakness* is a deficiency, or combination of deficiencies, in internal control such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected on a timely basis.

Our consideration of internal control was for the limited purpose described in the first paragraph and was not designed to identify all deficiencies in internal control that might be significant deficiencies or material weaknesses and, therefore, there can be no assurance that all such deficiencies have been identified. We did not identify any deficiencies in internal control that we consider to be material weaknesses.

We do have the following comment for your consideration.

FDIC Coverage

As a result of the Dodd-Frank Act passed in 2010, the FDIC provides unlimited coverage for non-interest bearing bank accounts maintained at FDIC-insured institutions from December 31, 2010 through December 31, 2012. Given the low interest rate environment and the bank balances held by the Regents Fund, we recommend the Regents Fund evaluate the feasibility of converting accounts with excessive balances to non-interest bearing accounts, thereby receiving unlimited coverage from the FDIC.

To the Board of Regents
Gunston Hall Regents Fund
October 20, 2011
Page 2

ATTACHMENT 2 - PAGE 2

This communication is intended solely for the information and use of management, the Board of Trustees, and others within the Regents Fund, and is not intended to be and should not be used by anyone other than these specified parties.

Sincerely,

Watkins Megan LLC

WATKINS | MEEGAN

October 20, 2011

To the Audit Committee
Gunston Hall Regents Fund

We have audited the financial statements of Gunston Hall Regents Fund (the Regents Fund) for the year ended June 30, 2011, and have issued our report thereon dated October 20, 2011. Professional standards require that we provide you with the following information related to our audit.

Our Responsibility under U.S. Generally Accepted Auditing Standards

As stated in our engagement letter dated April 19, 2011, our responsibility, as described by professional standards, is to express an opinion about whether the financial statements prepared by management with your oversight are fairly presented, in all material respects, in conformity with the modified cash basis of accounting. Our audit of the financial statements does not relieve you or management of your responsibilities.

Planned Scope and Timing of the Audit

We performed the audit according to the planned scope and timing previously communicated to management in our meeting about planning matters on July 26, 2011.

Significant Audit Findings

Qualitative Aspects of Accounting Practices

Management is responsible for the selection and use of appropriate accounting policies. The significant accounting policies used by the Regents Fund are described in Note 1 to the financial statements. Other than the change in capitalization policy, no new accounting policies were adopted and the application of existing policies was not changed during the year ended June 30, 2011. We noted no transactions entered into by the Regents Fund during the year for which there is a lack of authoritative guidance or consensus. There are no significant transactions that have been recognized in the financial statements in a different period than when the transaction occurred.

Accounting estimates are an integral part of the financial statements prepared by management and are based on management's knowledge and experience about past and current events and assumptions about future events. Certain accounting estimates are particularly sensitive because of their significance to the financial statements and because of the possibility that future events affecting them may differ significantly from those expected. We evaluated the key factors and assumptions used and determined estimates are reasonable in relation to the financial statements taken as a whole.

The disclosures in the financial statements are neutral, consistent, and clear. Certain financial statement disclosures are particularly sensitive because of their significance to financial statement users. The most sensitive disclosures affecting the financial statements were:

Investments

The disclosures in Notes 3 and 13 to the financial statements were based upon fair values. The Regents Fund's investments are classified according to the Regents Fund's investment policy.

Endowment

The Regents Fund's fair value of the endowment fund at June 30, 2011, is reported as an underwater fund, as the fair value of the fund is below the original cost.

Difficulties Encountered in Performing the Audit

We encountered no significant difficulties in dealing with management in performing and completing our audit.

Corrected and Uncorrected Misstatements

Professional standards require us to accumulate all known and likely misstatements identified during the audit, other than those that are trivial, and communicate them to the appropriate level of management. The attached schedule summarizes the uncorrected misstatement of the financial statements. Management has determined that its effect is immaterial, both individually and in the aggregate, to the financial statements taken as a whole. In addition, none of the misstatements detected as a result of audit procedures and corrected by management were material, either individually or in the aggregate, to the financial statements taken as a whole.

Disagreements with Management

For purposes of this letter, professional standards define a *disagreement with management* as a financial accounting, reporting, or auditing matter, whether or not resolved to our satisfaction, that could be significant to the financial statements or the auditors' report. We are pleased to report that no such disagreements arose during the course of our audit.

Management Representations

We have requested certain representations from management that are included in the management representation letter dated October 20, 2011.

Management Consultations with Other Independent Accountants

In some cases, management may decide to consult with other accountants about auditing and accounting matters, similar to obtaining a "second opinion" on certain situations. If a consultation involves application of an accounting principle to the Regents Fund's financial statements or a determination of the type of auditors' opinion that may be expressed on those statements, our professional standards require the consulting accountant to check with us to determine that the consultant has all the relevant facts. To our knowledge, there were no such consultations with other accountants.

Other Audit Findings or Issues

We generally discuss a variety of matters, including the application of accounting principles and auditing standards, with management each year prior to retention as the Regents Fund's auditors. However, these discussions occurred in the normal course of our professional relationship and our responses were not a condition to our retention.

This information is intended solely for the use of the Audit Committee and management of Gunston Hall Regents Fund and is not intended to be and should not be used by anyone other than these specified parties.

Sincerely,



Attachment

Client: **07140.07141 - Gunston Hall Regents Fund**
 Engagement: **AUD - Gunston Hall Regents Fund**
 Trial Balance: **0905 - Gunston Hall Regents Fund**
 Workpaper: **0930 - PJE's**

Account	Description	W/P Ref	Debit	Credit
Passed Journal Entries JE # 101		3000.01		
To reclassify contributions from unrestricted to temporarily restricted.				
30200-00	FUND BALANCE - PRIOR YEAR		9,193.00	
44905-02	Temp Res/Reg Gen			9,193.00
Total			9,193.00	9,193.00

Gunston Hall Regents Fund

FINANCIAL STATEMENTS – MODIFIED CASH BASIS
AND INDEPENDENT AUDITORS' REPORT
JUNE 30, 2011 AND 2010

WATKINS | MEEGAN

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Independent Auditors' Report

To the Board of Regents
Gunston Hall Regents Fund
Mason Neck, Virginia

We have audited the accompanying statements of assets, liabilities, and net assets – modified cash basis of Gunston Hall Regents Fund (the Regents Fund) as of June 30, 2011 and 2010, and the related statements of revenue, expenses, and change in net assets – modified cash basis and statements of cash flows – modified cash basis for the years then ended. These financial statements are the responsibility of the Regents Fund's management. Our responsibility is to express an opinion on these financial statements based on our audits.

We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audits to obtain reasonable assurance about whether the financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our audits provide a reasonable basis for our opinion.

As described in Note 1, these financial statements were prepared on the modified cash basis of accounting, which is a comprehensive basis of accounting other than accounting principles generally accepted in the United States of America.

In our opinion, the financial statements referred to above present fairly, in all material respects, the assets, liabilities, and net assets – modified cash basis of Gunston Hall Regents Fund at June 30, 2011 and 2010, and its revenue, expenses, and change in net assets – modified cash basis and its cash flows – modified cash basis for the years then ended, in conformity with the basis of accounting described in Note 1.



Bethesda, Maryland
October 20, 2011

STATEMENTS OF ASSETS, LIABILITIES, AND NET ASSETS – MODIFIED CASH BASIS

	<u>ASSETS</u>	
	June 30,	
	<u>2011</u>	<u>2010</u>
CURRENT ASSETS		
Cash and Cash Equivalents	\$ 1,676,164	\$ 1,710,864
Inventory	102,406	105,489
Due from Foundation	159,529	275,659
Total Current Assets	<u>1,938,099</u>	<u>2,092,012</u>
INVESTMENTS		
Unrestricted Reserve	2,225,291	1,164,228
Endowment	53,236	47,124
Total Investments	<u>2,278,527</u>	<u>1,211,352</u>
PROPERTY		
Educational Film	101,646	101,646
Furniture, Fixtures, and Equipment	68,347	68,347
Improvements	21,730	21,730
Total	<u>191,723</u>	<u>191,723</u>
Less: Accumulated Depreciation	<u>189,085</u>	<u>187,767</u>
Net Property	2,638	3,956
OTHER ASSETS		
Antique Fixtures	298,819	298,819
Manuscripts and Rare Books	723,568	715,093
Total Other Assets	<u>1,022,387</u>	<u>1,013,912</u>
	<u>\$ 5,241,651</u>	<u>\$ 4,321,232</u>
	<u>LIABILITIES AND NET ASSETS</u>	
CURRENT LIABILITIES		
Due to Commonwealth of Virginia	\$ 4,687	\$ 17,418
NET ASSETS		
Unrestricted	3,617,172	3,256,707
Temporarily Restricted	1,566,492	993,807
Permanently Restricted	53,300	53,300
Total Net Assets	<u>5,236,964</u>	<u>4,303,814</u>
	<u>\$ 5,241,651</u>	<u>\$ 4,321,232</u>

GUNSTON HALL REGENTS FUND

STATEMENTS OF REVENUE, EXPENSES, AND CHANGE IN NET ASSETS - MODIFIED CASH BASIS

	2011				2010			
	Unrestricted	Temporarily Restricted	Permanently Restricted	Total	Unrestricted	Temporarily Restricted	Permanently Restricted	Total
Year Ended June 30.								
REVENUE								
Contributions	\$ 205,077	\$ 951,424	\$ -	\$ 1,156,501	\$ 161,121	\$ 538,752	\$ -	\$ 699,873
Museum Shop Sales	142,474	-	-	142,474	123,947	-	-	123,947
Manager's Fund Revenues:								
Catering and Rental Income	2,312	-	-	2,312	1,000	-	-	1,000
Regents Meetings	41,775	-	-	41,775	58,210	-	-	58,210
Educational Programs	47,911	-	-	47,911	34,868	-	-	34,868
Total Manager's Fund Revenues	91,998	-	-	91,998	94,078	-	-	94,078
Interest and Dividends	47,154	1,246	-	48,402	32,501	1,458	-	33,959
Realized Gains or Sale of Investments	103,113	3,002	-	106,115	79,544	231	-	79,775
Field Trip	8,232	-	-	8,232	33,201	-	-	33,201
Miscellaneous	6,387	-	-	6,387	2,735	-	-	2,735
Net Assets Released from Restrictions:								
Satisfaction of Program Restrictions	387,516	(387,516)	-	-	321,582	(321,582)	-	-
Total Revenue	991,951	558,158	-	1,550,109	848,709	218,859	-	1,067,568
EXPENSES								
Program Services:								
Archaeology	44,836	-	-	44,836	34,045	-	-	34,045
Buildings and Maintenance	147,985	-	-	147,985	83,771	-	-	83,771
Collections Management	10,546	-	-	10,546	29,478	-	-	29,478
Education	22,385	-	-	22,385	25,232	-	-	25,232
Gardens and Grounds	39,355	-	-	39,355	65,220	-	-	65,220
Library, Archives, and Technology	70,175	-	-	70,175	66,339	-	-	66,339
Museum Shop	187,349	-	-	187,349	152,035	-	-	152,035
Manager's Fund	82,832	-	-	82,832	99,389	-	-	99,389
Programs	10,988	-	-	10,988	11,791	-	-	11,791
Public Relations	18,923	-	-	18,923	20,913	-	-	20,913
Restoration	37,247	-	-	37,247	36,750	-	-	36,750
Total Program Services	672,621	-	-	672,621	624,963	-	-	624,963
Supporting Services:								
Management and General	91,976	-	-	91,976	97,429	-	-	97,429
Fundraising	22,365	-	-	22,365	1,908	-	-	1,908
Total Supporting Services	114,341	-	-	114,341	99,337	-	-	99,337
Total Expenses	786,962	-	-	786,962	724,300	-	-	724,300
CHANGE IN NET ASSETS BEFORE UNREALIZED GAIN ON INVESTMENTS	204,989	568,158	-	773,147	124,409	218,859	-	343,268
Unrealized Gain on Investments	155,476	4,527	-	160,003	15,427	976	-	16,403
CHANGE IN NET ASSETS	360,465	572,685	-	933,150	139,836	219,855	-	359,691
NET ASSETS, Beginning of Year	3,266,707	983,807	53,300	4,303,814	3,116,871	773,972	53,300	3,944,143
NET ASSETS, End of Year	\$ 3,617,172	\$ 1,556,492	\$ 53,300	\$ 5,238,964	\$ 3,256,707	\$ 993,807	\$ 53,300	\$ 4,303,814

GUNSTON HALL REGENTS FUNDSTATEMENTS OF CASH FLOWS – MODIFIED CASH BASIS

	Year Ended June 30,	
	2011	2010
CASH FLOWS FROM OPERATING ACTIVITIES		
Change in Net Assets	\$ 933,150	\$ 359,671
Adjustments to Reconcile Change in Net Assets to Net Cash		
Provided by Operating Activities:		
Depreciation	1,318	1,767
Unrealized Gain on Investments	(160,003)	(16,403)
Realized Gains on Sale of Investments	(106,115)	(79,775)
Donations of Equity Investments	(22,891)	(15,460)
Changes in:		
Inventory	3,083	6,012
Due from Foundation	116,130	31,388
Due from Commonwealth of Virginia	-	55,465
Due to Commonwealth of Virginia	(12,731)	17,418
Net Cash Provided by Operating Activities	<u>751,941</u>	<u>360,083</u>
CASH FLOWS FROM INVESTING ACTIVITIES		
Purchases of Investments	(2,715,764)	(1,419,084)
Redemption/Sales of Investments	1,937,598	1,491,233
Purchases of Manuscripts and Rare Books	(8,475)	-
Net Cash Provided by (Used in) Investing Activities	<u>(786,641)</u>	<u>72,149</u>
NET INCREASE (DECREASE) IN CASH AND CASH EQUIVALENTS	(34,700)	432,232
CASH AND CASH EQUIVALENTS, Beginning of Year	<u>1,710,864</u>	<u>1,278,632</u>
CASH AND CASH EQUIVALENTS, End of Year	<u>\$ 1,676,164</u>	<u>\$ 1,710,864</u>
SUPPLEMENTAL SCHEDULE OF NONCASH INVESTING ACTIVITIES		
Donations of Equity Investments	<u>\$ 22,891</u>	<u>\$ 15,460</u>

NOTES TO FINANCIAL STATEMENTSJUNE 30, 2011 AND 2010

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Organization Purpose

The Gunston Hall Regents Fund (the Regents Fund) was incorporated October 29, 1982, to provide money and expertise to restore and refurbish George Mason's former residence, Gunston Hall, located in Mason Neck, Virginia. Additionally, the Regents Fund operates a museum shop on the premises and has facilities available for rent for banquets, receptions, and social gatherings.

Program services represent costs associated with the general education of the public at large as it relates to the life and historical impact of George Mason and costs related to the restoration, preservation, and promotion of Gunston Hall.

Basis of Accounting

The Regents Fund prepares its financial statements on the modified cash basis of accounting, which is a comprehensive basis of accounting other than generally accepted accounting principles. Under that basis, certain revenues and the related assets are recognized when received rather than when earned, and certain expenses are recognized when paid rather than when the obligation is incurred. Consequently, the Regents Fund has not recognized pledges receivable from donors, accounts payable to vendors, and their related effects on the change in net assets in the accompanying financial statements.

Estimates

The preparation of financial statements in conformity with the modified cash basis of accounting requires management to make estimates and assumptions that affect the reported amounts and disclosures. Accordingly, actual results could differ from those estimates.

Cash and Cash Equivalents

For financial statement purposes, all investments with maturities of three months or less at the time of purchase and money market funds not invested within the investment portfolios are considered to be cash and cash equivalents.

Inventory

Inventory consists of items for sale in the museum shop, and is valued at the lower of cost (average cost method) or market.

Investments

Investments purchased by the Regents Fund are initially recorded at their cost, and donated investments are recorded at fair value on the date they are received as a donation. Subsequent to their acquisition, investments in marketable securities with readily determinable fair values and all investments in debt securities are adjusted to their fair values as of the date of the statement of assets, liabilities and net assets – modified cash basis. Unrealized gains and losses are included in the change in net assets.

NOTES TO FINANCIAL STATEMENTSJUNE 30, 2011 AND 2010

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

Property

Acquisitions of property by the Regents Fund are recorded at cost and depreciated using the straight-line method over the useful lives of 15 years for the educational film; 3 to 10 years for furniture, fixtures, and equipment; and 6 to 40 years for improvements. All acquisitions by the Regents Fund greater than or equal to \$5,000 and \$500 for the years ended June 30, 2011 and 2010, respectively, with expected lives greater than one year are capitalized. Acquisitions on behalf of the Commonwealth of Virginia are not capitalized.

Antique Fixtures, Manuscripts, and Rare Books

Contributions of antiques and other items to the Gunston Hall Regents Fund are recorded at fair market value when received. Antiques, manuscripts, and rare books are not subject to depreciation. Acquisitions on behalf of the Commonwealth of Virginia are not capitalized.

Due to Commonwealth of Virginia

Amounts payable to the Commonwealth of Virginia are comprised of admission fees collected by the Regents fund which have not been remitted to the Commonwealth at year-end. Admission fees are charged by the Commonwealth of Virginia for entrance into the Gunston Hall Plantation. The Regents Fund collects these fees on behalf of the Commonwealth.

Revenue Recognition

Contributions of cash and other assets are recorded at estimated fair value as unrestricted, temporarily restricted, or permanently restricted support depending on the existence or absence of donor-imposed restrictions. Museum shop revenue is recorded gross, excluding sales tax, when the items are sold and managers fund revenue is recognized when cash is received for the activity.

Net Assets

Resources for various purposes are classified for accounting and reporting purposes into net asset groups established according to their nature and purpose and based upon the existence or absence of donor-imposed restrictions.

Unrestricted: Represents resources available to support the Regents Fund's general operations.

Temporarily Restricted Net Assets: Represents contributions received from donors that are restricted for a specific purpose.

Permanently Restricted Net Assets: Represents contributions to be held in perpetuity as an endowment. The investment income earned from the investments, including interest, dividends, and unrealized and realized gains and losses, are recorded as temporarily restricted revenue until appropriated for expenditure by the Board of Regents and are used to support the programs of the Regents Fund. Upon appropriation, the amounts for current year expenditures are classified to unrestricted net assets, subject to any purpose restrictions. All other investment income is reported as increases or decreases in unrestricted net assets unless their use is restricted by explicit donor stipulation or law.

NOTES TO FINANCIAL STATEMENTSJUNE 30, 2011 AND 2010

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

Temporarily Restricted Support

The Regents Fund's policy is to report all donor-restricted contributions as temporarily restricted support even if those restrictions are met in the same reporting period the contributions are received. When a restriction expires (that is, when a stipulated time restriction ends or the purpose for restriction is accomplished or an appropriation is made by the Board of Regents), temporarily restricted net assets are reclassified to unrestricted net assets and reported in the statements of revenue, expenses, and change in net assets – modified cash basis as net assets released from restrictions.

Endowment

If losses reduce the net assets of a donor-restricted endowment fund below the level required by the donor stipulations or the law, unrestricted net assets are reduced. Gains that restore the fair value of the net assets of the endowment fund to the required level shall be classified as increases in unrestricted net assets.

Allocation of Functional Expenses

Functional expenses have been directly coded to specific unrestricted functions whenever possible. Expenses which cannot be directly identified to a specific function are allocated between unrestricted program services and supporting services based on an analysis of personnel time.

Income Taxes

The Regents Fund is exempt from the payment of income taxes on its exempt activities under Section 501(c)(3) of the Internal Revenue Code (IRC). The Regents Fund is classified as a public charity under Section 509(a)(1) of the IRC. The Regents Fund is subject to federal and state income taxes on its unrelated business activities. There was no unrelated business income tax for the years ended June 30, 2011 and 2010; therefore, no provision for income tax has been recorded in the financial statements. Tax years prior to 2007 are no longer subject to examination by the IRS and the tax jurisdiction of Virginia.

Measure of Operations

The Regents Fund considers unrealized gain and loss on investments to be other items not included in its operations.

Subsequent Events

The Regents Fund has evaluated events and transactions for potential recognition or disclosure through October 20, 2011, the date the financial statements were available to be issued.

NOTE 2 – CONCENTRATION OF CREDIT RISK

Financial instruments, which potentially subject the Regents Fund to concentrations of credit risk, consist primarily of cash placed with a financial institution. Funds in excess of federal insurance limits totaled approximately \$1,412,000 at June 30, 2011. Management believes the risk of loss to be minimal at June 30, 2011.

NOTES TO FINANCIAL STATEMENTS

JUNE 30, 2011 AND 2010

NOTE 3 – INVESTMENTS

Investments are stated at their fair value and are comprised of the following:

	June 30,			
	2011		2010	
	Cost	Fair Value	Cost	Fair Value
Deposit Account	\$ 231,870	\$ 231,870	\$ 87,064	\$ 87,064
U.S. Government Securities and Corporate Bonds	708,015	746,528	439,611	477,875
Certificate of Deposit	100,000	95,625	-	-
Equities	1,353,607	1,204,504	959,645	646,413
	<u>\$ 2,393,492</u>	<u>\$ 2,278,527</u>	<u>\$ 1,486,320</u>	<u>\$ 1,211,352</u>

Investments include endowments which had a fair value of \$53,236 and \$47,124 at June 30, 2011 and 2010, respectively.

NOTE 4 – OTHER ASSETS

Objects acquired by gift for which Gunston Hall can reasonably estimate fair market value are reported as contributions in the statements of revenue, expenses, and change in net assets – modified cash basis. Objects acquired by purchase are recorded at cost.

During the years ended June 30, 2011 and 2010, the Regents Fund expended \$19,819 and \$123,744, respectively, for additions to the antique collection. These amounts were reimbursed by the Commonwealth of Virginia, which holds ownership; therefore, they are not reflected in the Regents Fund's financial statements. Additions not reimbursed during the year are recorded as "Due from Commonwealth of Virginia" on the statements of assets, liabilities, and nets assets – modified cash basis.

NOTE 5 – STRUCTURAL IMPROVEMENTS – GUNSTON HALL

During the years ended June 30, 2011 and 2010, the Regents Fund expended \$24,960 and \$67,718, respectively, for structural improvements to the Gunston Hall home. These improvements are expensed rather than capitalized, as the Regents Fund does not own or lease the Gunston Hall home.

NOTES TO FINANCIAL STATEMENTSJUNE 30, 2011 AND 2010

NOTE 6 – RESTRICTED NET ASSETS

The changes in each fund within temporarily restricted net assets for the years ended June 30, 2011 and 2010, are as follows:

	Balance July 1, 2010	Revenue	Expenses/ Net Assets Released from Restriction	Transfers to Unrestricted	Balance June 30, 2011
Temporarily Restricted:					
Administrative	\$ -	\$ 4,200	\$ (1,680)	\$ -	\$ 2,520
Archaeology	25,203	570	(5,564)	-	20,209
Buildings	88,990	122,354	(113,465)	-	97,879
Collections/Antiques	8,473	200	(8,040)	-	633
Development	-	600	-	-	600
Education	8,137	340	(2,493)	-	5,984
Endowment	-	8,777	(2,665)	-	6,112
Friends	553,462	142,213	(138,828)	-	556,847
Gardens	-	21,500	(14,561)	-	6,939
George Mason Memorial	48,626	-	(30,000)	-	18,626
Leased Operations	-	100	-	-	100
Library	33,424	179,742	(12,860)	-	200,306
Programs	3,118	3,165	(5,727)	-	556
Public Relations	25,992	4,100	(14,385)	-	15,707
Restoration	198,382	472,340	(37,248)	-	633,474
Total Temporarily Restricted	\$ 993,807	\$ 960,201	\$ (387,516)	\$ -	\$ 1,566,492
	Balance July 1, 2009	Revenue	Expenses/ Net Assets Released from Restriction	Transfers from Unrestricted	Balance June 30, 2010
Temporarily Restricted:					
Archaeology	\$ 25,203	\$ -	\$ -	\$ -	\$ 25,203
Buildings	-	134,168	(45,178)	-	88,990
Collections/Antiques	1,576	25,942	(19,045)	-	8,473
Education	6,320	7,515	(5,698)	-	8,137
Endowment	-	2,665	(2,665)	-	-
Friends	552,649	142,980	(142,167)	-	553,462
Gardens	11,600	12,570	(24,170)	-	-
George Mason Memorial	48,626	-	-	-	48,626
Library	45,580	12,502	(24,658)	-	33,424
Programs	6,250	6,489	(9,621)	-	3,118
Public Relations	17,397	25,000	(16,405)	-	25,992
Restoration	58,771	171,586	(31,975)	-	198,382
Total Temporarily Restricted	\$ 773,972	\$ 541,417	\$ (321,582)	\$ -	\$ 993,807

There were no changes to permanently restricted net assets for the years ended June 30, 2011 and 2010.

NOTES TO FINANCIAL STATEMENTSJUNE 30, 2011 AND 2010

NOTE 7 – ENDOWMENT

The Regents Fund's endowment consists of individual funds established for the restoration of Gunston Hall and related activities. Its endowment includes donor-restricted endowment funds. Net assets associated with endowment funds are classified and reported based on the existence or absence of donor-imposed restrictions.

Permanently Restricted Net Assets – Interpretation of Relevant Law

The Board of Regents has interpreted the State Prudent Management of Institutional Funds Act (SPMIFA), as enacted into law in Virginia during October 2008, as requiring the preservation of the fair value of the original gift as of the gift date of the donor-restricted endowment funds absent explicit donor stipulations to the contrary. As a result of this interpretation, the Regents Fund classifies as permanently restricted net assets (a) the original value of gifts to the permanent endowment, (b) the original value of subsequent gifts to the permanent endowment, and (c) accumulations to the permanent endowment made in accordance with the direction of the applicable donor gift instrument at the time the accumulation is added to the endowment. The remaining portion of the donor-restricted endowment fund that is not classified as permanently restricted net assets is classified as temporarily restricted net assets until those amounts are appropriated for expenditure by the Regents Fund in a manner consistent with the standard prudence prescribed by SPMIFA.

In accordance with SPMIFA, the Regents Fund considers the following factors in making a determination to appropriate or accumulate donor-restricted endowment funds:

- (1) The duration and preservation of the fund
- (2) The purposes of the Regents Fund and the donor-restricted endowment fund
- (3) General economic conditions
- (4) The possible effect of inflation and deflation
- (5) The expected total return from income and the appreciation/depreciation of investments
- (6) Other resources of the Regents Fund
- (7) The investment policies of the Regents Fund

Funds with Deficiencies

From time to time, the fair value of the assets associated with individual donor-restricted endowments may fall below the level that the donor or SPMIFA requires the Regents Fund to retain as a fund of perpetual duration. Appropriations come first from temporarily restricted net assets not appropriated and then from unrestricted net assets. Deficiencies of this nature that are reported as unrestricted net assets were \$64 and \$6,176 at June 30, 2011 and 2010, respectively. These deficiencies resulted from market fluctuations that occurred during the year ended June 30, 2011, and previous years and the continued appropriation of expenditures as deemed prudent by the Board of Regents.

Permanently Restricted Net Assets – Return Objectives and Risk Parameters

The Regents Fund has adopted investment and spending policies for endowment assets that attempt to provide a predictable stream of funding to programs supported by its endowment. Endowment assets include those assets of donor-restricted funds that the Regents Fund must hold in perpetuity or for a donor-specified period. Under this policy, as approved by the Board of Regents, the endowment assets are invested in a manner intended to produce results that exceed inflation and the S&P 500 Index while assuming a relative level of investment risk.

GUNSTON HALL REGENTS FUND
NOTES TO FINANCIAL STATEMENTS

JUNE 30, 2011 AND 2010

NOTE 7 – ENDOWMENT (Continued)

Permanently Restricted Net Assets – Strategies Employed for Achieving Objectives

To satisfy its long-term rate-of-return objectives, the Regents Fund relies on a total return strategy in which investment returns are achieved through both capital appreciation (realized and unrealized) and current yield (interest and dividends). The Regents Fund targets a diversified asset allocation and places greater emphasis on equity-based investments to achieve the long-term return objective within prudent risk constraints.

Spending Policy and How the Investment Objectives Relate to Spending Policy

The Regents Fund has a policy of appropriating for expenditure each year up to 5 percent of the average market value of the endowment assets utilizing the previous twelve (eight for the year ended June 30, 2010) quarterly periods. In establishing this policy, the Regents Fund considered the long-term expected return on its endowment net assets. Accordingly, the Regents Fund expects the endowment to grow by at least inflation annually.

The following is a summary of donor-restricted endowment funds subject to SPMIFA for the years ended June 30, 2011 and 2010:

	<u>Unrestricted</u>	<u>Temporarily Restricted</u>	<u>Permanently Restricted</u>
Endowment Net Assets, June 30, 2009	\$ (9,201)	\$ -	\$ 53,300
Investment Return:			
Interest and Dividends	-	1,458	-
Net Appreciation (Realized and Unrealized)	3,025	1,207	-
Total Investment Return	<u>3,025</u>	<u>2,665</u>	<u>-</u>
Appropriation of Endowment Assets for Expenditure	<u>-</u>	<u>(2,665)</u>	<u>-</u>
Endowment Net Assets, June 30, 2010	(6,176)	-	53,300
Investment Return:			
Interest and Dividends	-	1,248	-
Net Appreciation (Realized and Unrealized)	6,112	1,417	-
Total Investment Return	<u>6,112</u>	<u>2,665</u>	<u>-</u>
Appropriation of Endowment Assets for Expenditure	<u>-</u>	<u>(2,665)</u>	<u>-</u>
Endowment Net Assets, June 30, 2011	<u>\$ (64)</u>	<u>\$ -</u>	<u>\$ 53,300</u>

NOTES TO FINANCIAL STATEMENTS

JUNE 30, 2011 AND 2010

NOTE 8 – RELATED PARTY

A donor relationship exists between the Gunston Hall Foundation (the Foundation), which is exempt from taxation under IRC Section 501(c)(3), and the Regents Fund. The Regents Fund incurs salaries and other related costs on behalf of the Foundation. Such salaries and other related costs are presented as Management and General on the accompanying statements of revenue, expenses, and change in net assets – modified cash basis.

During the years ended June 30, 2011 and 2010, the Regents Fund received funding from the Foundation totaling \$110,624 and \$146,805, respectively, for salary and related costs provided to the Foundation which is included in contributions in the statements of revenue, expenses, and change in net assets – modified cash basis. At June 30, 2011 and 2010, the amounts due to the Regents Fund by the Foundation totaled \$159,529 and \$275,659, respectively, and relate to support obligated by the Foundation not yet paid.

NOTE 9 – FACILITIES AND SERVICES PROVIDED BY COMMONWEALTH OF VIRGINIA

The Gunston Hall buildings and surrounding land are owned and maintained by the Commonwealth of Virginia. The Regents Fund leases the museum shop and banquet facilities from the Commonwealth of Virginia under two three-year leases expiring October 31, 2012, for \$1 annually. The below-market lease and associated donation are non-cash items which have not been recorded under the modified cash basis of accounting.

Services and facilities are provided by the Commonwealth of Virginia, but are not reflected in these financial statements, as the ownership of the Gunston Hall Plantation resides with the Commonwealth.

The Commonwealth expended \$66,355 and \$23,145 on Plantation and library improvements during the years ended June 30, 2011 and 2010, respectively. Additionally, the Commonwealth of Virginia operates the Gunston Hall Plantation and provides certain management and administrative support to the Regents Fund at no charge, including the employment of 6 full-time and 22 part-time employees at Gunston Hall for the year ended June 30, 2011. The Commonwealth provided approximately \$676,000 and \$775,000 during the years ended June 30, 2011 and 2010, respectively, of labor and support, which have not been recorded under the modified cash basis of accounting.

NOTE 10 – DONATED SERVICES

During the years ended June 30, 2011 and 2010, specialized historical services were provided by volunteers to the Regents Fund and were valued at approximately \$138,060 and \$154,844, respectively, for each period presented. Such amounts are not included as contributed services revenue and program expenses on the accompanying statements of revenue, expenses, and change in net assets – modified cash basis.

NOTE 11 – RETIREMENT PLAN

The Regents Fund has a 401(k) plan. Any employee who has completed six months of service is eligible to participate in the plan. Participants may make contributions up to 15 percent of their compensation, subject to statutory limits. The Regents Fund may elect to make discretionary contributions. Participants are vested immediately with respect to participant contributions. Participants are fully vested in employer contributions after three years. The Regents Fund contributed \$4,984 and \$7,387 to the plan for the years ended June 30, 2011 and 2010, respectively.

NOTES TO FINANCIAL STATEMENTSJUNE 30, 2011 AND 2010

NOTE 12 – MANUSCRIPTS AND RARE BOOKS CONTINGENCY

It has been determined that a portion of the manuscripts and rare books recorded as assets in the Regents Fund's financial statements were originally donated to the Commonwealth of Virginia (Gunston Hall) and not the Regents Fund. Management is in the process of determining what portion of its manuscripts and rare books were in fact assets of the Commonwealth of Virginia. Management estimates the cost of the manuscripts and rare books that ultimately could be determined to be the Commonwealth of Virginia's property ranges between \$0 and \$640,000. The effect of this determination will be to reclassify the manuscripts and rare books recorded on the Regents Fund's financial statements to the Commonwealth and would decrease the unrestricted net assets and manuscripts and rare books on the Regents Fund's statements of assets, liabilities, and net assets – modified cash basis.

NOTE 13 – FAIR VALUE MEASUREMENTS

The Regents Fund has determined the fair value of certain assets and liabilities through application of FASC Topic on *Fair Value Measurements and Disclosures*. Fair value of assets and liabilities measured on a recurring basis at June 30, 2011 and 2010, is as follows:

	Fair Value	Fair Value Measurements at Reporting Date Using		
		Quoted Prices in Active Markets for Identical Assets/Liabilities (Level 1)	Significant Other Observable Inputs (Level 2)	Significant Unobservable Inputs (Level 3)
<u>June 30, 2011</u>				
<u>Assets</u>				
Deposit Account	\$ 231,870	\$ 231,870	\$ -	\$ -
U.S. Government Securities and Corporate Bonds	746,528	-	746,528	-
Certificate of Deposit	95,625	-	95,625	-
Equities	1,204,504	1,204,504	-	-
	<u>\$ 2,278,527</u>	<u>\$ 1,436,374</u>	<u>\$ 842,153</u>	<u>\$ -</u>
<u>June 30, 2010</u>				
<u>Assets</u>				
Money Market	\$ 87,064	\$ 87,064	\$ -	\$ -
U.S. Government Securities and Corporate Bonds	477,875	-	477,875	-
Equities	646,413	646,413	-	-
	<u>\$ 1,211,352</u>	<u>\$ 733,477</u>	<u>\$ 477,875</u>	<u>\$ -</u>

NOTES TO FINANCIAL STATEMENTS

JUNE 30, 2011 AND 2010

NOTE 13 – FAIR VALUE MEASUREMENTS (Continued)

This FASC topic establishes a fair value hierarchy that prioritizes the inputs to valuation techniques used to measure fair value. This hierarchy consists of three broad levels: Level 1 inputs consist of unadjusted quoted prices in active markets for identical assets and have the highest priority, Level 2 inputs are based primarily on quoted prices for identical assets and liabilities in inactive markets and for similar assets or liabilities in active or inactive markets, and Level 3 inputs have the lowest priority and are based on unobservable inputs, including the Regent Fund's own data when there is little or no market activity for the assets and liabilities. The Regents Fund uses appropriate valuation techniques based on the available inputs to measure the fair value of its investments. When available, the Regents Fund measures fair value using Level 1 inputs because they generally provide the most reliable evidence of fair value. There have been no changes in the valuation methodologies used during the current year. All assets have been valued using a market approach.

Level 2 Fair Value Measurements

The fair value of the underlying investments in U.S. government securities, corporate bonds, and the certificate of deposit are not exchange traded investments and are valued based on quoted prices for identical assets in inactive markets and/or similar assets in active or inactive markets.

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News

A Statement From the Director of Gunston Hall

Relative to recent events

By [Shawn Drury](#) [Email the author](#) January 27, 2011

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Subsequent to the termination of a staff position at Gunston Hall on January 21, questions have been raised about Gunston Hall, its mission and its finances. The attached information will help to answer these questions.

David L. Reese

1. Gunston Hall's Mission statement: Gunston Hall preserves, interprets and promotes this eighteenth-century historic site in order to educate the public about the significance of its owner, George Mason, for his unique contribution to the universal cause of human rights.
2. The Regents of Gunston Hall preserve George Mason's residence, maintain the grounds in an historically appropriate manner, and exhibit objects which belonged to Mason or relate to his life. The Regents also maintain an important library containing letters signed by Mason and his contemporaries, books which belonged to Mason, and a modern reference library with books about Colonial America and Virginia. The site is intended as a permanent memorial to George Mason, author of the Virginia Declaration of Rights.
3. The Regents and staff of Gunston Hall operate public tours of the site for 362 days of the calendar year. They also present special programs, events and lectures. Although living history performances are a component of some programs, Gunston Hall is not a living history museum.
4. Annual attendance at Gunston Hall has ranged between 22,513 and 27,678 for the past five years. Most historic sites have experienced diminished visitation at this time. Gunston Hall's school-tour attendance has remained constant, at approximately 10,000 students, during the same period. The size of the Mansion's interior, and the time constraints imposed by school schedules, limit expansion of the school tour program.
5. Gunston Hall is an agency of the Commonwealth of Virginia, and receives an annual allocation of funds from the Commonwealth. The allocation covers approximately one-third of Gunston's annual budget; the remainder is supplied by private sources. Almost all of these funds are designated for specific purposes, e.g., building repair, grounds maintenance, programming, etc. There are few dollars available for discretionary expenditures.

6. The Commonwealth and Regents of Gunston Hall are stewards of the Collections Fund, currently valued at \$1.1 million. Monies from this account may be expended only for objects and furnishings or their restoration. The Fund is invested largely in U.S. Treasury Bills, in accordance with Commonwealth guidelines and the standards established by the American Association of Museums. The Fund supports Gunston's curatorial acquisitions.

7. Gunston Hall's public finances are scrutinized by regular audits from the Commonwealth of Virginia; privately funded portions of the operation undergo an annual audit by a certified public accounting firm specializing in non-profit organizations. The Commonwealth's audit for the fiscal years ending June 30, 2008 and June 30, 2009 contained no comments. The private audit issued by Watkins Meehan for the fiscal year 2009-2010 contained no comments. The Regents and staff of Gunston Hall are understandably proud of this clean fiscal record.

8. Gunston Hall currently employs eight full time workers and twenty-five part time workers. Apart from the terminated education position, there are currently two other unfilled positions.

9. Despite the termination of an education staff member, Gunston Hall will conduct all scheduled school tours and all events and programs scheduled for 2011. The staff and members of the Gunston Hall Docents Association have confirmed their commitment to present these tours and programs to the public.

10 Gunston Hall will expend \$241,201 on education and Interpretive staff salaries, public tours and programs and other educational support in fiscal year 2010-2011. The Commonwealth will provide approximately 60% of those funds; the remainder is provided by the Friends of Gunston Hall and private grants given in response to requests issued by the Director and the Development Officer.

11 Almost every educational or cultural agency in the United States is presently experiencing radical cuts in their annual budgets. Many of these institutions have closed. Recent reductions in the Commonwealth's allocation to Gunston Hall have been painful. However, the Regents and staff of Gunston Hall feel that, given the economic condition of the Nation, the actions of Governor McDonnell and the legislature in this regard have been fair and reasonable. Almost every agency has been asked to reduce costs and Gunston must do its part. The Governor is working earnestly to restore fiscal health to Virginia. He is a friend of historic sites and he is very proud of Virginia's great history. Better economic times will come to Virginia and to Gunston Hall.

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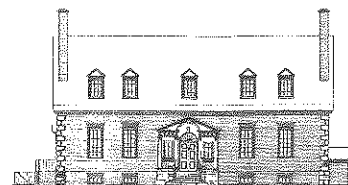
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GUNSTON HALL

Home of George Mason

Mason Neck, Virginia 22079-3901

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MEMORANDUM

TO: The Honorable David Albo
The Honorable Linda T. "Toddy" Puller
The Honorable Gerard Robinson
The Honorable Scott Surovell

CC: Mr. Kevin Gentry
Penelope Payne, Esq.
Mrs. Henry R. Raab
✓ Mr. Timothy J. Sargeant

FROM: David L. Reese *David L. Reese*

DATE: April 1, 2011

RE: Educational Events and Programming at Gunston Hall

Thank you for taking the time to speak with me recently about Gunston Hall and its educational mission. Despite limits in funding and staff, Gunston's educational programming remains strong. During our conversations I stated that I would update you on current educational activity. A synopsis is attached.

EDUCATIONAL EVENTS, TOURS AND PROGRAMMING AT
GUNSTON HALL

Special Events

On February 13, 2011 Gunston Hall held its fourth annual Seeds of Independence program, chronicling the history of the African American community on Mason Neck. This year's topic was Segregation and Desegregation during the 1950's and 1960's. The "Seeds" Committee produced a short documentary film featuring interviews with the first African-American student who attended Gunston Elementary School, individuals who taught at the all-black Gum Springs School, individuals who boarded with relatives in Washington, D.C. in order to attend high school since there were no educational options for African Americans in this area, and others who lived through this turbulent era. The Virginia Foundation for the Humanities funded production of this film. After the film's premiere Juan Williams, the prominent broadcast journalist and author, spoke about the era of desegregation; his galvanizing lecture incorporated some of the experiences of Mason Neck citizens, and tied them to national events. The audience of 170 people responded with a tremendous ovation.

Two weeks later, on three successive Sundays, Gunston Hall presented the Liberty Lecture Series. The series theme was The Roots of Liberty, exploring some of the sources that have inspired revolutionary movements in America from 1776 until today. On February 27, cultural historian Karin Calvert spoke about the evolving psychology of 18th-century people; they moved from perceiving themselves as minions of family, king and circumstance to an understanding that they were free individuals who had rights, desires and the ability to assert themselves. They could influence their own destinies and shape their own governments. Dr. Kevin R. Hardwick (James Madison University) spoke on March 6 about "Fear of Demagoguery in the Virginia Ratifying Convention" of 1788. There were codes of language and behavior that shaped the convention's review of the proposed Constitution of the United States. Passions were meant to be checked, so that reason could dominate the debate. On March 13, Dr. Jay M. Parker (National Defense University) talked about the "Tea Parties" of 1776 and the Tea

Party of today; both started as maverick “grass roots” movements, both sought radical change, both won popular attention and support. Each lecture attracted approximately fifty listeners, many of them local teachers. Up to six recertification points were available to educators.

On March 26 Gunston Hall hosted its longest continuously running event, the Annual Kite Festival. On a cool spring day with bright blue skies, more than eight hundred visitors flew kites in the great west field, toured the Mansion, sampled 18th-century recipes in the open hearth kitchen, enjoyed a period puppet show, practiced writing with a quill pen in the school house, watched craft demonstrations, learned basic archaeological techniques, and explored the grounds of the estate.

Tour Program

- During the month of February, Gunston Hall Docents guided 525 school children around George Mason’s mansion and grounds. February is, perennially, the slowest month for visitation in the year.
- In March, 1,778 local students took guided tours of Gunston Hall; many of the tours were enriched by “hands-on” activities, hearth cooking demonstrations and interaction with costumed interpreters. Gunston Hall Docents have guided every scheduled tour group during these months.
- Advance tour bookings for April and May are very solid; there are 1,172 students confirmed for April field trips, and 1,630 to date for May. More bookings are anticipated.

Teacher Workshops

- On March 28, twenty four Fairfax County teachers gathered here from 4:30 – 6:00 p.m. for a familiarization tour, highlighting the educational opportunities available to their students. The teachers were enthusiastic about bringing their students in the future.
- On June 14, from 1:00 - 4:30 p.m., Gunston Hall will host the Illinois Teachers Workshop. The group will attend lectures about Colonial economics, the

Revolutionary War era and the creation of the Constitution. They will hold group discussions in the Ann Mason Room, and enjoy a ninety minute tour of George Mason's residence, outbuildings and grounds.

- On June 24, the Bill of Rights Institute of Washington D.C. will coordinate a day-long session for thirty two students and teachers at Gunston Hall. Seminars and lectures will focus upon the significance of the United States Bill of Rights, and will include discussion of George Mason's Virginia Declaration of Rights. Attendees will have a tour of Gunston Hall, the outbuildings and grounds.
- The Social Studies Coordinator for Fairfax County has requested use of Gunston Hall on October 18, 2011 for a Social Studies Department Chair meeting. The Chairs will meet from 8:00 a.m. – 3:00 p.m., and will receive a special SOL-based tour of Gunston Hall, the outbuildings and grounds, meet with Gunston staff and Docents, and enjoy a scholarly presentation by a re-enactor portraying George Mason.
- Other teachers groups have expressed interest in coming to Gunston Hall, and will confirm scheduling at a later date.

Future Events

The Scripps National Spelling Bee will host their "Family Day" at Gunston Hall on Memorial Day, May 30, 2011. Contestants competing at the Gaylord Center will be bussed here with their families to enjoy a day of games and programs under a huge tent in the west field. Each guest will be offered a viewing of Gunston's orientation film and a guided tour of the mansion. Cooking in the hearth kitchen will take place throughout the day, and each visitor will receive a copy of George Mason's Virginia Declaration of Rights along with other gifts in a take-away bag. The event planners expect 800 to 1,200 guests. Gunston Hall hosted this event in 2004; it is an honor to have won it back this year.

During the past month, Gunston staff members have worked with personnel administrators from the Administrative Office of the United States Courts in Washington, D.C. in planning a training event. The Court Administrators hold leadership training for

upper and mid-level managers in the court system. Managers may be from legal staff, Information Technology, or any branch of the operation. These training sessions are held at historic sites in the metropolitan area, and training is constructed around a general theme. This year's theme is "working collaboratively," and some components will examine how the founding fathers worked together in writing the U.S. Constitution. Trainees will have meetings, lectures, and three meals daily in the Visitor Center's Ann Mason Room. There will be tours and other events for trainees while they are not in classes, and there will be a lecture about George Mason on opening day. The entire week of May 9 - 13 is reserved for these sessions. The Court's most recent session was held at "Mount Vernon" in February, and during their week here the trainees will take field trips to "Monticello" and "Montpelier." The U.S. Courts Administration office has also reserved a second week in August for more training classes, which include 35-50 managers in each session.

Both the Spelling Bee event and the U.S. Courts training sessions contain educational components, both will generate substantial rental income, both will present the opportunity to inform the public about George Mason and Gunston Hall.



[VISIT](#) [EVENTS](#) [GEORGE MASON](#) [MANSION](#) [GROUNDS](#) [EDUCATION](#) [LIBRARY](#) [COLLECTIONS](#) [ABOUT](#) [SHOP](#) [GIVE](#)

[PROGRAMS](#) • [FIELD TRIPS & OUTREACH](#) • [TEACHER RESOURCES](#) • [SCOUTS](#) • [VOLUNTEERS & INTERNS](#)

FIELD TRIPS & OUTREACH

At Gunston Hall plantation in northern Virginia, the past offers exciting adventures in learning and hands-on discovery. Students consider the ideas of Founding Father George Mason and find out what life was like for his family, slaves, and servants over 225 years ago. Their experience is coordinated with the Virginia Standards for Learning for the teaching of social studies in elementary and secondary schools. The past offers exciting adventures in learning & hands-on inquiry. [Education Brochure pdf](#)

Explore ... Consider ... Try It!

[On-Site Programs](#) • [We Come to You](#) • [School Events](#) • [Write About It!](#)

On-Site Programs

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Grades 1-12

GEORGE MASON'S PLANTATION WORLD

Learn about George Mason— American patriot, brilliant author, husband and father, slave owner and successful planter. Discover how Mason's *Virginia Declaration of Rights* and his contributions to *The Constitution of the United States* shaped American government.

Examine the magnificent rooms of Mason's home, and explore the lives of the Mason family, indentured servants, and enslaved workers who lived at Gunston Hall in the 18th century. Enjoy lively, interactive tours of the Mansion, schoolhouse, kitchen yard, grounds, Touch Museum, and the Visitors Center galleries.

Allow ninety minutes on-site.

Grades 3-12

Tailored Tours

Gunston Hall's education staff will work with teachers in customizing your on-site or outreach experience to address a particular curricular interest, such as George Mason as Patriot, the tobacco economy, slavery, or day-to-day life on a Virginia plantation. A variety of hands-on activities including a visit to the Touch Museum may enrich presentations to students.

Extraordinary Tours

Extraordinary tours are designed for groups of 40-85 students and are offered on a limited basis throughout the school year. Tours will feature conversations with costumed characters from the past, hearth- cooking demonstrations, 18th century games, penmanship, and deportment lessons. Allow 2 1/4 hours for this deluxe tour experience.

We're Coordinated

All school tours and classroom programs satisfy specific Virginia Standards of Learning. To receive a complete list of standards covered by each school offering, contact the Education Department at 703-550-9220, ext. 239.



Photo by Jack L. Hiller

RESERVING YOUR TOUR**Tour Fees****Students:**

George Mason's Plantation World Tour \$5.00
 Extraordinary History Tours \$7.00
 Tailored Tours \$7.00

Chaperones \$7.00
 Teachers and Bus Drivers
 (up to two teachers per class) Complimentary

One Chaperone is required for each twelve students. One home school parent per group of twelve students is admitted free of charge. Additional adults pay the chaperone rate. All school tours and classroom programs satisfy specific Virginia Standards of Learning. Reservations are required for all programs. Telephone for reservations Monday-Friday between 9:30 a.m. and 5:00 p.m. at 703-550-9220. Student tours are welcomed throughout the year, including the summer months; booking for upcoming school year tours begins on the first Monday in June.

Accessibility

Gunston Hall is committed to providing services to individuals with disabilities. In advance of a school visit, teachers should request and complete a "Class Profile Sheet" describing the special needs of students. Contact the Reception Desk at 703-550-9220 for information.

Who Conducts Your Tour

All school tours are conducted by members of the Gunston Hall Docents' Association. These volunteers have all received extensive training in 18th century living, history, politics, and architecture, and are well-educated in techniques for teaching young people. Many of the docents are retired educators and several have over 20 years of experience giving tours at Gunston Hall.

Your classes will be divided into groups and an appropriate number of docents will be assigned to give each group of 10-15 students a tour with a personal touch.

We Come to You

Grades 4, 5, & 6

**We Come to Your Classroom
 Meet George Mason**

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Gunston Hall docents bring the 18th century into your classroom with this outreach program that presents George Mason as author of the Virginia Declaration of Rights, as a principal contributor to the U.S. Constitution, and as a planter, businessman, and slave owner. Using hands-on objects and visuals, students explore the day-to-day life of planter families, indentured servants, and slaves.

This program is offered to public and private schools in Arlington, Fairfax and eastern Prince William counties and the City of Alexandria.

Program: 1 1/2 hours.

Please schedule this visit no earlier than 10:00 a.m.

Recommended Group Size: Up to 35 students.

Fee: \$65.

Exciting and Interactive School Events

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Special Events

Grades 4 and Up

Constitution Day:

An Interactive Program on George Mason and the Constitution



Photo by Jack L. Hiller

Wednesday, September 14, 2011
 Wednesday, September 15, 2012

Join us for this hands-on day focusing on George Mason's world at the creation of the United States Constitution. Find out about Mason's role in creating the Constitution and why he refused to sign it. Students discover the social and economic conditions of 1787 Virginia, help prepare foods popular in at the time; practice penmanship skills; discuss politics with characters from the past; and experience 18th century entertainments, among other activities.

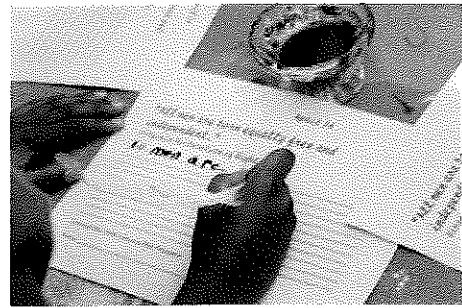


Photo by Jack L. Hiller

Tours begin at 10:00 and 10:45 a.m.
 Program: 2 1/4 hours.
 Group Size: Open
 One chaperone required per 12 to 15 students

Fee:
 Students \$7
 School staff members (up to 2 per class): free
 Chaperones \$7

Home schoolers are welcome in groups of at least 12 4th – 12th graders.
 One home school parent per group of 12 students is admitted free of charge; others must pay the chaperone rate.

Grades 4 - 6
Hands-On Colonial Days:
At Home with George Mason
 Thursday, October 20, 2011
 Thursday, April 19, 2012
 Thursday, October 18, 2012
 Thursday, April 18, 2013

Students are immersed in the people and activities of an 18th century Virginia plantation. Students carry out plantation jobs in the kitchen yard; interact with characters from George Mason's time; and play colonial games on the plantation lawns. The schedule includes daily life demonstrations and hands-on opportunities. Student-friendly tours of the mansion and a story telling program are special features of the day.

Reservations taken for 10:00 and 10:30 a.m.
 Program: 2 1/4 hours.
 Group Size: Open
 One chaperone required per 12 to 15 students

Fee:
 Students \$7
 School staff members (up to 2 per class): free
 Chaperones \$7

Home schoolers are welcome in groups of at least 12 4th - 6th graders only (no young students). One home school parent per group of 12 students is admitted free of charge; others must pay the chaperone rate.

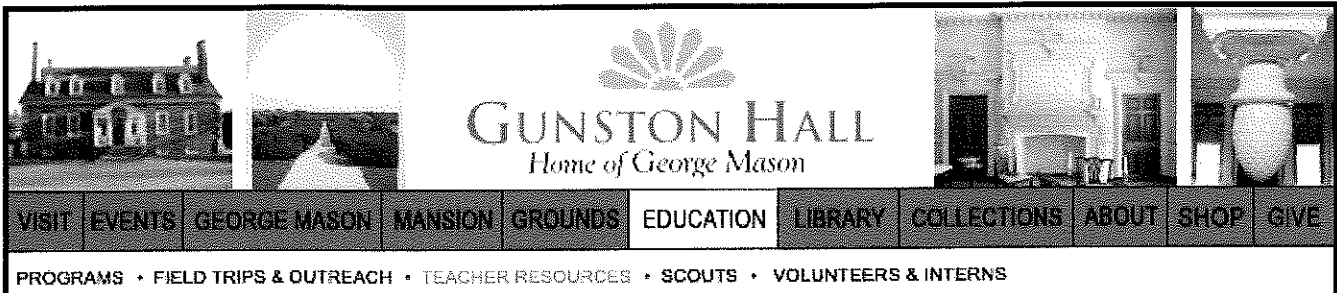
[Education Brochure.pdf](#)

Write About It!

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During the day-long *Christy Hartman Myers Writing Workshop*, students have the opportunity to try out different forms of writing, including non-fiction, historical fiction, journalism, and poetry. They also will learn how an author can be his or her own illustrator. A focus for the writing will be key events in George Mason's life. The program, held in the spring, is open to current 4th and 5th graders throughout the region. All sessions, materials, lunch, and snacks are included in a modest fee. Reservations are required and space is limited. After January 5, please call 703-550-9220 for additional information.

The annual *Christy Hartman Myers Writing Award* will be selected each spring. The competition, which involves writing an essay in the classroom on George Mason, is open to 4th graders who experience Gunston Hall on a class field trip or in an outreach program. A check for \$100 will be awarded to the author of the winning essay. Details on the initiative will be provided to teachers reserving a school tour or outreach program.



TEACHER RESOURCES

Supplement Your Classroom Materials -- Reasonably

Education was important to George Mason, as it is to us today at Gunston Hall. Enrich your classroom with materials devoted to George Mason and 18th-century life. Stop by the Museum Shop from 10 a.m. to 5 p.m. daily or call 703-550-9220, ext. 222, with questions or current pricing requests or to place an order. You also can make purchases on-line. Teachers receive a 10% discount on materials purchased for use in the classroom.



Photo by Jack L. Hiller

Curriculum Guides

A copy of the grade-appropriate guide is provided free of charge when reserving an on-site or outreach program. Also available in an online format by clicking the links below.

[Discover George Mason: Home, State, and Country](#) (free download)
30 lessons for grades 3 through 6.
[Purchase a copy](#)

[George Mason, Patriot & Planter](#) (free download)
15 lessons for grades 7 through 12.
Includes a classroom guide to the film, *George Mason and the Bill of Rights*.
[Purchase a copy](#)

[Growing Up at Gunston](#) (free download)
For Grades 1 & 2, in conjunction with the [Growing Up at Gunston Hall](#) school tour.

Perfect for Teachers

George Mason and the Bill of Rights
This film on Mason's life and political contributions is now available as a DVD. Best suited for grades 4 and up.
[Purchase a copy](#)
DVD or video also may be borrowed free of charge for up to three weeks.

George Mason, Father of the Bill of Rights
Carla R. Heymsfeld and Joan W. Lewis. Patriotic Education Incorporated.
Especially for student readers, upper elementary age and up.
[Purchase a copy](#)

George Mason, Forgotten Founder.
Jeff Broadwater.
This 2006 biography is especially strong on Mason's political contributions.
Excellent background for teachers.
[Purchase a copy](#)

I'm Not Signing That!: George Mason Stands Up for the United States Bill of Rights
An American Citizenship Project book. Based on historical fact, this text was written by a group of Kansas students.

Especially for student readers, upper elementary age and up.
Purchase a copy

Of Land & Labor.

M. Lauren Bisbee. An exploration of 18th-century life on a Virginia plantation, with Gunston Hall as the focus.

Appropriate for use with a secondary school class or for background for teachers.

Purchase a copy

The Recollections of John Mason. You and your students can read what George Mason's fourth son, John, had to say about Gunston Hall, plantation life, and his distinguished father. The beautifully-illustrated primary document, divided into thematic topics for easy classroom use, features a short biography of George Mason.

Purchase a copy

Educational Posters

George Mason. Fee.

Virginia Declaration of Rights. Fee.

Gunston Hall Edu-Kits

Very popular for teachers taking field trips to Gunston Hall! A sampler of fun and educational take-home items for students provides a wise solution for time-constrained school tours.

A choice of two kits: George Mason and Patriot.

Must be pre-ordered and picked up on the day of your field trip.

\$5 each.

On-Site Lectures and Workshops for Teachers

14th Annual Liberty Lecture Series

Sundays, February 26, March 4 and 11, 2012 at 3 p.m.

This lecture series, held annually since 1998, provides an opportunity for teachers and secondary school students to enhance their understanding of the framework for the nation's government from the time of colonist George Mason to today. Past issues discussed have included such diverse topics as modern interpretations of the Constitution, Presidential power, immigration, slavery, and religion. Presenters include historians, judges, attorneys, professors, and, on occasion, George Mason himself.

Reception from 2:30 - 3 p.m.

Each lecture: \$9 per adult and \$5 for students through 12th grade. Thirty-minute guided tour of the mansion included.

Six re-certification hours may be earned for the complete lecture series.

Teachers' Day Out

At Home with George Mason

Wednesday, August 8, 2012

8:30 a.m. - 5:30 p.m. (10 re-certification hours)

Open to elementary, secondary, and home school teachers

Spend a relaxing and informative day at Gunston Hall dedicated to the life and ideas of George Mason. Linger in the Visitors' Center over coffee as you are introduced to this important patriot and planter in his home setting. Indulge in a specially designed hands-on plantation tour as you participate in daily activities that would have been second nature to the master of this plantation. Through informal presentations geared to your level, deepen your knowledge of Mason's most well-known documents, the Virginia Declaration and the Objections to the Constitution. As you conclude your day, expert elementary and secondary teachers will share their personal strategies for making George Mason come alive in your classroom.

The \$25 fee covers the program, related materials, and a continental breakfast. Registration is required. Call 703-550-9220.

Plan a Workshop with Us

Plan a teacher workshop or special-focus visit on George Mason or 18th-century plantation life.

The Education Department is delighted to work with educators (12 or more preferred), either at Gunston Hall or on location in your school or district.

Library and Archives

Carry out research in the Gunston Hall Library and Archives. The collection of manuscripts, rare books, and modern reference resources covers a wide range of 18th-century topics. Contact the Librarian to make an appointment, 703-550-9229 or library@gunstonhall.org.

Website Resources

Educational materials about Gunston Hall and George Mason may be found in other locations on our Website:

- [Mason's life and times](#)
- [Timeline](#)
- [Research Guides](#)
- [Historic human rights documents](#)
- [And More](#)

Gunston Hall | 10709 Gunston Road | Mason Neck, VA 22079
Phone: 703.550.9220 | Fax: 703.550.9480 | Email: historic@gunstonhall.org
Open every day except Thanksgiving, Christmas and New Year's Day. Public hours: 9:30 a.m. - 5:00 p.m.
[Copyright Statement](#) | [Site Map](#)

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ATTACHMENT 7

Information provided by
External sources and verified
by the Executive Director

Gunston Hall Visitation Fiscal Year 2000-2001 to FY 2009-2010												
	Adults	Adult Groups	Children	Rental	Special	Scouts	School Groups	Chaperones	Camps	Student Outreach	Adult Outreach	TOTAL
FY 0-1	8489	6483	2370	5055	1314 n/a		8015 n/a		5995	2963 *		40664
FY 1-2	6885	6602	2410	4133	1285 n/a		9029 n/a		7170	2492 *		40006
FY 2-3	4739	7081	2794	2636	1066 n/a		6795 n/a		3960	1108 *		30169
FY 3-4	2827	5282	1808	3100	835 n/a		6218 n/a		3025	1987 *		24882
FY 4-5	3062	5182	3055	2388 n/a		405	7201	1103	4552	1347 *		28295
FY 5-6	2524	5454	2527	25 n/a		579	8490	1194	3722	1251 *		25766
FY 6-7	2023	5117	2363	949 n/a		402	7126	966	2769	798 *		22513
FY 7-8	1852	5692	1981 n/a	n/a		139	9934	1405	2566	2211 *		25780
FY 8-9	3056	5507	2674	706 n/a		171	9602	1316	2431	1882	253	27598
FY 9-10	2620	5427	1975	156 n/a		123	9162	1103	2385	1601	239	24791
*Student & adult outreach combined												
Collection of data and definition of categories have changed over time.												
Currently we are endeavoring to count individuals who come to see Gunston Hall and are for the most part paying customers.												
We no longer include individuals attending local meetings who neither visit the historic property nor pay admission. This is a change as of 2003.												

**A Year in Review at Gunston Hall
Fiscal Year 2010-2011**

- Report of The First Regent: A Year of Expanded Thinking
- Letter from the Director
- Visitation and Special Events
- Gunston Hall Archaeology Program
- Historic Landscape and Grounds
- Mansion Restoration and Collections
- Library & Archives
- Public Relations
- The Gunston Hall Museum Shop
- Gunston Hall Financial Statement

Report of the First Regent: A Year of Expanded Thinking

Throughout the 2010-2011 fiscal year the Board of Regents refined and expanded its thinking about the study of George Mason and Gunston Hall Plantation, and the furtherance of our mission.

First, we have grown to appreciate that in studying Mason and his plantation, we no longer define the “historic” portion of the property as an immediate curtilage around the Mansion. Rather, we now recognize the entirety of Gunston Hall Plantation as “historic.” Director Reese has shared his perception that every element and *relationship* of elements contributed to Mason’s design of his plantation home. Views, perspectives, the location of the landing road, even modest details of topography, all contribute to our appreciation that nothing at Gunston Hall is a result of serendipity. Significantly, the Historic Gardens and Grounds Committee was renamed the Historic Landscape Committee.

In addition, we embraced change within the Mansion. Following weeks of quiet study Curator Caroline Riley chose to reverse the furnishings of the Palladian and Chinese rooms. The evolution of discovery with regard to wall treatments and original paint color formed a natural segue to a better understanding of how each room would have been used by the Mason family. Further study led to a reversing of mantels between a Mansion bedroom and the library.

Finally, we are working hard in furtherance of the mission of the Board of Regents, to embrace curiosity on the part of the public regarding our role as administrators, to supplement the ever-dwindling resources of the Commonwealth of Virginia, and by expanding our website. With the expertise of Librarian and Archivist Mark Whatford we can share knowledge of all the Board does to “preserve, interpret, and promote this historic site in order to educate the public about the international significance of its owner, George Mason, for his unique contribution to the universal cause of human rights.”

Mrs. Henry R. Raab
First Regent, Gunston Hall

Letter from the Director

This has been a difficult year for not-for-profit organizations in America, including historic sites. Visitation levels have diminished at historic properties, revenues have fallen, municipal and state funding for these institutions has been cut drastically. Gunston Hall remains healthy for one reason: private support. Much of this support comes from Gunston's loyal and generous Regents and Former Regents. "Friends" giving grows stronger each year, despite the failing economy. Major gifts from foundations have funded capital projects, and sizeable bequests help sustain the Library, historic research and educational initiatives. Gunston Hall received \$1,053,474 in gifts, grants and "Friends" donations this year, drew \$274,253 from its managed funds, and received an allocation of \$489,039 from the Commonwealth of Virginia (with an additional \$11,661 in prior year reversions, \$32,581 in insurance recoveries and \$8,453 in IT funding). The Commonwealth also provided \$63,916 from the maintenance reserve for a handicapped access project. Admission receipts totaled \$151,300. These amounts and the final tally of earned income will be confirmed by auditors and presented to the Board of Regents at their Annual Meeting in October.

With this solid economic assistance, in the fiscal year 2010-2011 Gunston Hall's Regents and staff have coordinated installation of a new boiler and related HVAC improvements in the Visitors Center, exterior restoration of two houses on the estate, completion of a new well and water works, and restoration of the southeast chamber on the second floor of the Mansion (previously used for storage and now open to the public). The Commonwealth funded construction of a new handicapped access lift on the east elevation of the Mansion. Private grants enabled extensive relocation of utility lines underground and in the Mansion's basement, accommodating construction of the lift. In June, craftsmen and technicians began an enormous task: conservation of the black walnut woodwork of Gunston Hall including doors, door reveals, and elements of the superbly carved Hall/Passage Stair. Although visitors and Mansion guides must dodge scaffolds, conservators, and drop-cloths for the duration of summer, the end result will be rewarding. This magnificent restoration project has been funded by the Nancy Woodson Spire Foundation.

As other components in this report confirm, Gunston Hall staff members continue to acquire important objects, make fascinating archaeological discoveries, present outstanding educational programs, provide guided tours to thousands of visitors, maintain the Mansion, support facilities and the grounds -- all in the effort to inform the public about the importance of George Mason.

David L. Reese
Director, Gunston Hall

Visitation and Special Events

25,060 individuals visited Gunston Hall in 2010-2011. 9,305 children visited with school groups, and another 1,895 students of all ages toured Gunston Hall with their families. Outreach programs served 475 students in local schools. Adults, seniors, and individuals on group tours compose the remaining portion of Gunston's visitors. 460 people took advantage of the new \$25.00 family rate. The Gunston Hall Docents Association provided guides for school tours, and Gunston's "twenty-two" Mansion interpreters guided visitors through the house seven days a week.

Throughout the year, Gunston Hall staff members orchestrated a variety of special events including the Liberty Lecture Series which examined the writers and philosophers who inspired the American Revolution, the Annual "Kite Day Festival," the Plantation Christmas celebration that incorporated living history performances and a holiday dinner, and a Decorative Arts Symposium focusing upon the French influence on American design in the Federal period. An enormously popular program documenting the history of segregation and civil rights on Mason Neck 1950-1970, featured a dynamic speech by journalist Juan Williams. Smaller programs crafted for special interest audiences gave children the opportunity to participate in archaeological excavations or offered adults the chance to learn and practice 18th-century hearth cooking techniques. On Sunday afternoons, architecture aficionados enjoyed ninety minute tours of the Mansion's exterior and interior, including the cellar. Other tour groups explored the estate's historic landscape.

In 2010-2011 Gunston Hall rented out portions of the facility for several programs having an educational purpose. From May 9-13, the Administrative Division of the United States Courts offered leadership training to forty-five of their senior and mid-level managers at Gunston. The trainees studied how America's Founders worked collaboratively in creating the United States Constitution. They attended daily lectures, enjoyed extensive tours of Gunston Hall and its grounds, and made field trips to "Montpelier," "Monticello," and Mt. Vernon." On Memorial Day, Gunston Hall hosted a barbeque for the contestants of the Scripps National Spelling Bee and their families. The event was held under an enormous tent in the great meadow west of the Mansion. 940 guests attended, and during the day they enjoyed Mansion tours, hearth cooking demonstrations, living history presentations, modern and 18th-century games, and showings of the site's orientation film, "George Mason and the Bill of Rights." Educational Associate Frank Barker has coordinated a series of teacher workshops, including several for teachers attending the Bill of Rights Institute. The workshop incorporates tours, discussion groups and lectures about the creation of American government. These educational rentals generate revenue for Gunston Hall and also accommodate programs which relate directly to Gunston Hall's mission.

Gunston Hall Archaeology Program

Archaeological investigations during the reporting period focused on the kitchen yard and the area near the land front (north) side of the Mansion. The kitchen yard work was initially done in response to the pending construction of a handicapped access lift and associated utility lines, and realignment of a section of the kitchen yard fence. Most of the area investigated was once covered by a frame addition to the Mansion, dating from the second half of the 19th-century. It was found that a basement once underlay half of the southern-most section of the frame structure, and that the cavity had been filled with mixed soil containing 18th- through 20th-century artifacts. Other findings include; 1) a brick and concrete pier that probably supported the southeast corner of a porch attached to the frame structure; 2) a post feature belonging to a fence which had at one time been thought to have been the original kitchen yard paled fence, but which has now proven to be of 19th-century origin; 3) a post hole and mold feature which suggests that the 18th-century garden fence extended into what is now presented as the kitchen yard and joined the east side of the Mansion; 4) two superimposed pebble walkways. The upper of these seems to run diagonally across the kitchen yard and was probably in use into the early 19th century. The lower of the two runs parallel to the east side of the mansion, about twenty feet from it, and appears to date from the 18th-century. There is evidence that a fence was located a short distance from the edge of this walk nearest the Mansion. An effort is now being made to follow this walk, since it may have a bearing on the size and configuration of the original kitchen yard. Among the many artifacts collected during the walkway excavations are coins dating to 1812, 1802 and 1775, and a two-pronged, bone-handled fork of a style dating to the last quarter of the 18th-century.

Excavations on the land front of the Mansion are being undertaken to determine if there is any evidence of a carriage circle. Although there is no documentary evidence of such a feature at Gunston Hall, it would be very unusual for a house of Gunston's period and status not to have one. The remains of an old road were found running parallel to the north side of the Mansion and closer to it than the current road. The oldest (deepest) part of the road appears to date to the 18th-century. A walkway lies about a foot to the south (mansion) side of the road. Also, an effort is underway to find evidence of a carriage mounting block that once reposed alongside this road.

Historic Landscape and Grounds

In late summer of 2010, the large willow oak tree northeast of the Mansion's land front entrance started dropping huge limbs. The tree had been in deteriorating condition for many years. At the October Meeting of the Regents, members of the Historic Landscape Committee voted unanimously to have the oak removed, citing the potential danger of falling limbs and noting that the tree was not in keeping with George Mason IV's plan for the grounds. Quality Tree Care took down the old tree several weeks later, utilizing an army of tree climbers, pruners and cutters.

Rotting wooden rail fences were removed from land front areas and the entrance driveway during winter months. Archaeologists are now searching for evidence of the original configuration of the line fences in the vicinity. John Mason, in his "Recollections" of Gunston Hall, describes extensive fields of close-cropped grass on the land front, which were enclosed by fence on the outer edge and bounded by woods. Grounds workers Berto Delfi and Buddy Mongold have worked diligently to establish good turf in the open fields, spending many days mowing, smoothing rough areas of ground and clipping saplings. As a result of their hard labor, the appearance of the approach to Gunston Hall is beginning to match John's depiction.

In February and March, the steep bank west of the four squares of George Mason's vegetable garden was cleared of brush and fallen timber. It is now possible to see the old Barn Wharf Trail below the high bank, emphasizing an historic feature of the landscape. A new red Ford pick-up truck, purchased on Commonwealth contract in January, facilitates this work on the grounds.

Mansion Restoration and Collections

The most important addition to Gunston Hall's collection in 2010-2011 was a pair of portraits of George Mason IV and his wife Ann Eilbeck Mason. John Hesselius painted marriage portraits of the couple in 1750; by 1811 the portraits were badly deteriorated, and children of George and Ann commissioned the artist Dominic W. Boudet to paint three sets of copies of the originals. The original paintings were subsequently lost, making the 1811 portraits of greater significance. They are among the few known images of Mason and his first wife. One pair of these portraits was given to the Virginia Museum of Fine Arts by David K.E. Bruce. The Directors of the Virginia Museum have graciously donated the portraits to Gunston Hall in perpetuity.

A variety of new acquisitions are 18th-century objects which correspond to archeological finds at Gunston Hall or archival references to objects belonging to George Mason. For example, a pair of recently-purchased English glass wine decanters, ca. 1770-1780, relate closely to the description of decanters purchased by Mason in 1766. A set of four elegant ale glasses was purchased to correspond to archaeological shards of almost identical glasses found on the site. Evidence unearthed by the Archaeology Department also informed the purchase of one dozen salt-glazed stoneware plates and two serving dishes, all in the "barley" or "mosaic" patterns made in Britain in the mid-18th century. Other shards confirm Mason family possession of more unusual and costly ceramics, such as pierced fretwork creamware. While the stoneware probably saw daily use by the family, the creamware was likely used for social entertainments. Ten dinner plates of the reticulated creamware in George Mason's pattern have been purchased from a London antiquarian. A highly important Virginia easy chair, made near Petersburg in the 1760s, has rested in Gunston's storage collection for a long time. The chair has been conserved, exquisitely re-upholstered, and placed on view in the Little Parlor. Since George Mason was afflicted with gout, he may have utilized a similar easy chair.

There have been major restoration and conservation projects in the Mansion's interior. The only remaining, original, second floor fireplace mantel from the house had been installed in the Hertle Building in 1955. With assistance from Matt Webster, an architectural conservator at Colonial Williamsburg, the mantel surround was removed from the Hertle Library and re-installed in its original location in the Mansion's Southwest Chamber. Afterwards, paint conservator Chris Mills replicated a faux-stone finish using grey paint and Potomac River sand, based upon paint analysis evidence found by Dr. Susan Buck. The original black walnut door between the Dining Room and Parlor, with boldly carved egg and dart moldings, was conserved by F. Carey Howlett, formerly of Colonial Williamsburg.

Library & Archives

Mark Whatford joined the staff in late August of last year, assuming the responsibilities of Librarian, Archivist and Chief Information Officer of Gunston Hall. In January a generous bequest was made to the Library from the estate of Dudley Porter, Jr. in memory of his wife Mary Rhoda Montague Porter for the conservation and acquisition of books and documents relating to George Mason. Currently four of Mason's books are being conserved with funds from this bequest. The Founding Fathers Consortium [book catalog] continues to move ahead; once Mount Vernon's Library Staff has completed adding items, the catalog will be made publicly available. Ultimately, Stratford Hall's Library will also join this initiative.

The Library has added over 150 titles to its open stacks since September through the support of our Regents and Docents. At auction last October, the Library acquired a George Mason IV signed document dated May 16, 1751. This is now the earliest signed GM IV item in our collection.

There have been exciting discoveries in the Archives. An unpublished letter from George Mason to George Washington, dated April 1769, was uncovered in Gunston's stored files. A political pamphlet written by Thomas Cooper in 1792 was also found in archival storage. The pamphlet belonged to George Washington and bears his signature on the cover. This same pamphlet was loaned to Thomas Jefferson by President Washington. A second, unpublished Washington letter was also found in the collection; in it the President, prior to leaving office in 1797, gives a recommendation for his Philadelphia cook.

Public Relations

Director David Reese and Development Coordinator Susan Blankenship attended the American Bus Association Marketplace in Philadelphia, Pennsylvania on January 10–12, 2011. Seminars with historic attraction peers and travel specialists provided great insight on the group tour industry. This second year of participation has garnered five bus tours to date, as well as early Plantation Christmas bookings.

Impressive feature articles and paid advertisements appeared in widely-circulated magazines and newspapers throughout the past fiscal year, including *AAA World*, *American Spirit*, *Preservation*, *Smithsonian*, *Where Magazine*, *The Washington Post Annual Museum Guide*, and *The Washington Post Weekend*. On June 16, a State Department tour for members of the Foreign Press Association garnered a Romanian Public Television documentary and a Serbian newspaper feature on George Mason and Gunston Hall.

Outreach and VIP tours included a visit from the Women's Committee of the Trust for the National Mall, a Mt. Vernon-Lee Chamber of Commerce reception, a luncheon and tour for the Fairfax Ambassadors Program, the Ft. Belvoir Officers' Wives' Club Annual Information Fair, and onsite tours and meeting space for several NSCDA chapters and committees. The Dominion Foundation generously provided funding for the design, production and state-wide circulation of a handsome new Gunston Hall Rack Card.

The Gunston Hall Museum Shop

Visitors to Gunston Hall enjoy the addition of a trip to the museum shop. Here they find a lasting memento of their Gunston Hall experience. Postcards, books, jewelry, wine, and more are amply available for purchase. The shop is also the source for gifts to the surrounding Mason Neck community.

The Gunston Hall Museum Shop is a bricks and clicks store. Gunston Hall themed merchandise and books about George Mason and the Bill of Rights are for sale. Our online shop can be found by selecting the "Shop" option through the main Gunston Hall web address www.gunstonhall.org. You are also invited to visit our Facebook page.

Like many retail venues we have been challenged by the economy and the new methods in which retail is valued but with pride we report our 2011 yearly sales up over 2010 by \$30,000.

Gunston Hall Financial Statement

Gunston Hall's financial statement will be available on line subsequent to presentation to the Board of Regents in October 2011.



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“It Can’t Just Be Fun”

What Teachers Want from Field Trips

By Mary Ellen Flannery

Ten-year-old Alejandra, playing the part of a fortunate daughter of Virginia patriot George Mason, has spilled a slice of onion pie on her raspberry silk dress. In 1770, you can’t just send your soiled duds off to the dry cleaner. But there are slaves for such things and they whisk her fine dress off to the laundry. Once there, they spread it across a white-covered table next to a crackling wood fire and begin scrubbing the stain with bran.

“Bran? Like Raisin Bran?” asks 10-year-old Alyiah, incredulously.

Indeed, the common cereal was a Colonial stain remover. Question answered, Alyiah takes another handful of the pale grain and works it into the fabric. She smiles widely, though, because this kid is no slave from history. Rather, she’s a student of it. And this is one of the most interesting lessons yet.

Both Alejandra and Alyiah are fourth-graders from Mosby Woods Elementary in suburban Fairfax County, Va. This morning, their school bus sailed down the grand alley of Gunston Hall, Mason’s landmark plantation overlooking the Potomac River, with a singular purpose: a field trip. This is where the curriculum comes alive, says their teacher, Melissa Cox.

For teachers across the country, museum field trips are essential tools in creating vibrant, memorable lessons. But as school budgets tighten and educators face increasing pressure to tailor their lessons to standardized tests, that kind of hands-on, real-life educational experience may be endangered. Sort of like trans-Atlantic travel on the RMS *Queen Mary*—it sounds lovely, of course. But do we really have the time? Or the money? The answer is yes. Field trips shouldn’t be considered luxury travel. But educators from California to Connecticut say the future of these learning adventures really depends on whether a museum experience can offer the kind of focused educational experience they need.

“It can’t just be fun. And it has to go beyond an emotional connection,” says Tracey Wilson, a U.S. history teacher in West Hartford, Conn., who won that state’s History Teacher of the Year award in 2008. For more than 20 years, Wilson has been taking her students on purposeful trips to the nearby Noah Webster House as well as to Old Sturbridge Village, an outdoor history museum in Massachusetts. It is fun, sure. But it’s not *just* for fun.

No Child Left Behind (NCLB), the controversial 2001 federal law, aims to have every student in the country—no exceptions—passing state standardized tests in reading and math by 2014. It’s a noble goal, especially as it has focused new attention on the lagging scores of black and Hispanic students. But with such an ambitious benchmark, you may as well call it Every Child on His Behind. With schools under tremendous pressure to improve scores in those core subjects, many school administrators have called for increased “seat time,” which sounds exactly like what it is. There’s your desk—sit down, listen and learn. And it often doesn’t include art, music or physical education classes. A chief complaint about NCLB from parents and teachers is that its laser-like focus on reading, math and now science test scores has forced a narrowing of the curriculum.

At one Palm Beach County, Fla., elementary school, too many students—many still learning English—failed to pass that state’s reading test; the principal’s first response was to end recess and field trips. “Florida Comprehensive Assessment Test, yes. Field trips, no,” says Alexandra Navarro Clifton, a Palm Beach County parent and high school English teacher.

Meanwhile, school districts are also coping with the worst economy in most school board members’ memories. In Virginia’s

Fairfax County, those Mosby Woods kids visiting Gunston Hall are lucky. Under a proposed budget to solve that district's \$220 million shortfall, next year's fifth-graders would have to stay in the classroom. No trips would be allowed. Several hundred miles north, in an effort to cut field trip costs, one western Massachusetts principal has decided to drive the bus himself.

So, take a pinch of NCLB mania, add a heaping spoonful of budget woes, and you've got a recipe for field trip poison. But it doesn't have to be fatal. Many teachers still believe that field trips are an irreplaceable learning tool—a way to make their classroom lessons come alive and to create lifelong memories (and lessons) for their students. They will make the case for field trips to their principals and other school administrators, but they need your help.

Since NCLB and its demands are a fact of life, educators must reshape field trips so they support a standards-based curriculum. (Although changes to NCLB by Congress are likely this year, most policy-watchers don't expect a total reversal in policy. It's more likely that states will have a greater role in deciding how to measure proficiency and greater latitude in deciding how to test English Language Learners or kids with disabilities.) With that in mind, teachers can't just go to Gunston Hall to have a little break from the routine and kick-start their kids' imaginations about life in Colonial times. But they can certainly go there because Virginia's Standards of Learning test requires fourth-graders to learn about George Mason and the document he authored, the Virginia Declaration of Rights (an influential progenitor to the U.S. Bill of Rights). "This is right out of the standards," Cox says as she surveys her students splitting into small groups for different learning centers. Students shifting uncomfortably within the faint boundaries of incredibly small slave quarters are learning "VS.4.a," or the "importance of agriculture and its influence on the institution of slavery."

"How many 10-year-olds do I have?" a Gunston Hall docent asks the group. As hands go up, he nods at his new slaves. "Great. I have a lot of field workers. And I'll be waking you up at 4 a.m."

Inside an outbuilding on the Gunston Hall estate, the Mosby Woods kids dip white goose feather quills into shallow plates of black ink and take a stab at old-fashioned penmanship. Their task is copying this sentence: "All men are by nature equally free and independent and have certain inherent rights." Dry quills scratch paper—and also etch a memorable lesson into a 10-year-old's mind.

"If I were a museum professional," says California science teacher Anthony Cody, "I'd look at the content standards for the grades that I was trying to attract, and I'd figure out what aspects and exhibits in my facility could help with those particular standards." He suggests, "I'd also think about activities the teachers could do in their classrooms before they came to the museum."

Ambitious? Maybe, but remember that the field trip isn't a stand-alone event for most teachers. When they embark on a unit of study, something like "Early Explorers" or "Animal Habitats," teachers often spend weeks or months in that area, and they'll use all sorts of teaching tools: songs, worksheets, guest speakers, computer games, group projects, posters and, of course, field trips.

Pre-trip materials provided by a museum destination can do two things: serve as another tool to teach the standards and prepare kids for what they're going to see on their excursion. With the right preparation, they should be ready to open their minds as soon as the school bus doors open. When Cody taught animal adaptations to his Oakland middle-school students, their trip to the California Academy of Sciences was just one part of a month's worth of lessons. First they learned about false eyespots and body coloration in the classroom; then they saw it in the aquarium tanks. Any information that the museum could have provided ahead of time about its exhibits would have been helpful, he said.

For Donnalyn Schuster, an upstate New York high school art teacher, online access to a museum's collection is the best preparation. "Some museums have slide kits—it's old technology, but it works. A nice online gallery with information about the particular artist is even more helpful. We try to give students some background information before they go."

Even better, teachers can sometimes find a way for students to relate to the people they're learning about. Christine Southard, a second-grade teacher from Long Island, N.Y., recently shared with students a letter that could have been written by a 10-year-old farm girl whose parents moved from Long Island to Illinois in 1839. "My Father has been worried because the drought has been bad for the last couple of years," Jennifer Smith wrote, explaining how it was getting harder and harder to scratch out a living. So the Smiths decided to take their chances somewhere else, the letter reads. First they'll take a stagecoach to Chicago, then a new railroad car to St. Joseph's, Mo., and then they'll pack a wagon for the 2,000-mile journey along the Oregon Trail.

"I can't wait to meet you so that you can help us choose the best kind of wagon to buy for our trip," Jennifer wrote. "Maybe you will think of things we should include on our long journey that we have forgotten. See you at 10 a.m." At the Long Island Museum, that is,

where the kids will climb aboard that iron-horse train, just like their pen pal. "Their knees were bumping, just piled in there together, back to back, seated on top of each other, holding tickets. 'Son! You don't have a ticket! You'll have to get out of the train!'" Southard recounts. "It was a great role-playing exercise."

Here's one piece of advice: Forget the scavenger hunt. "When kids get into a new environment, if they don't have something concrete to do, they tend to run around. Scavenger hunts ... tend to be trivial pursuits," says Cody. What many teachers prefer, especially elementary- and secondary-school history teachers, are role-playing exercises because they engage students on a deeper level and aid their mastery of the curriculum standards. Role-playing helps students make emotional connections, says Connecticut history teacher Wilson, and also to process questions and find answers.

Susan Hildt, a fifth-grade teacher at the Renbrook School in Avon, Conn., organizes a year's worth of American history around an enormous role-playing event, when each of her students assumes the role of a Colonial tradesperson—cooper, blacksmith, apothecarist—right down to the appropriate Old English accent. To help them develop their roles, they visit Old Sturbridge Village and seminal sites in Boston, including the Granary Burying Ground and Old South Church. At the latter, they'll actually hold a town meeting.

"Fie, fie, fie! Yea! Yea!" the kids shout, as they divide into Patriots and Loyalists and debate the king's prerogative to tax their tea.

Wilson takes role-playing to a more sophisticated level for her high school students, using primary source documents. At Noah Webster House, where Wilson also serves as historian, she has designed activities for visiting students, including her own. In one, they explore what life would have been like in 1775. And it's not enough just to wear the shackles—they also need to use historical documents to help them learn their roles. "If high school students can really give it up and get into the game, really suspend their identities and become somebody else ... well, that's the beauty of being [at] a historic place. You have the place, as well as the program, to bring them back in time," Wilson says. "But you have to go beyond the emotions. They have to go into it with a question in mind."

But finding the answers, either through role-play or other activities, doesn't mean the lessons are over. Just as teachers engage in pre-trip activities, they also use the experience in post-trip lessons. Wilson's Advanced Placement U.S. history students returned from Old Sturbridge Village with a specific assignment: writing a series of letters between a farmer who lives in Sturbridge, a rural community of the 1830s, and a friend who moved to Ohio or South Carolina. The letters should reveal the effects of the market revolution on their lives. "Their job, while we're at Sturbridge, is to go around, talk to interpreters and record the information that they'll need," Wilson says. Meanwhile, Southard's students are working on their own post-trip activity: turning all of the audio, video and still photographs they shot during their trip to the Long Island Museum into multimedia projects.

Back at Gunston Hall, 10-year-old Adam says sitting on a wooden bench in a cold schoolhouse, genuine white quill in his fist, was his favorite part of the trip. Others were fascinated by the full-skirted Colonial cooks with hot waffle irons in hand. And, of course, all of the Mosby Woods kids enjoyed games in the garden, pushing a teetering hoop with a wooden stick or painstakingly tossing a wooden ball into a small cup. "I am determined to get this in there!" says Bonnie, swinging her arms and bending her knees in a full-body effort to beat the 300-year-old game.

But during docent lectures, especially outside on a blustery 32-degree morning, their attention wanes. "Can we go back to the bus?" whispers one. And the Touch Museum, where they sat for a lecture on the Boston Tea Party—a subject they haven't covered yet in class—was disappointing. "I might have thought we would actually get to touch things," Cox notes.

Hands-on activities are the Lost Ark of field trips. Everybody is looking for them. When first-grade teacher Amber Sterns recounts her very best field trip to the Minnesota Children's Museum, she immediately says, "It was so hands-on!" Her kids threw on "community helper" costumes and pretended to be chefs, police officers, nurses and grocery store clerks. "The kids loved that part. And me, too! They wrote about that experience in their journals for a long time afterward."

Sterns teaches kids who are still learning English, a rapidly growing group in the United States, particularly in heartland states like Nebraska and Colorado and much of the Southeast. They may be immigrants, but more likely they were born in the United States to immigrant parents. Currently, about 10 percent of American students are classified as "limited English proficient." And about 14 percent of all students have been identified as disabled, about half of whom have "specific learning disabilities" (a federal classification defined by law as "an imperfect ability to listen, think, speak, read, write, spell, or to do mathematical calculations"). Basically, they don't learn the same way as other kids. Nonetheless, the vast majority of these students will be included in mainstream classrooms like Long Island teacher Christine Southard's. She is a special education teacher who works in a regular classroom with a co-teacher.

What this means for museum professionals is that not every child can—or should—listen quietly to a lecture on the Boston Tea Party. Some, called “auditory learners” by educational researchers, will do just fine in a “listen carefully, children” environment, but educators believe those students are few—possibly as little as 10 percent of the school population. More students (particularly girls, researchers say) are “visual learners” who learn best by seeing or reading. The rest are tactile or kinesthetic learners, and they’re the ones who start smiling in a museum’s discovery room. They learn best by touching, feeling and experiencing. With these differences in mind, the museum experience needs to be multisensory to reach every child, says Southard. “How are you going to meet these different kinds of learners?”

Academics aside, teachers have a few other requests. First is a place to eat lunch. On their recent trip, Southard and her kids unpacked their PB&J’s on the bus. “You’re really not supposed to eat on the bus,” she sighed, but the lovely courtyard at the Long Island Museum was no place for a picnic in 27-degree weather.

It also would be nice to have a meeting place. And it’s just downright essential to have handy bathrooms, especially for the youngest kids.

What if classes just decided to stay at school? Could you come see them instead? Staffers from Plimoth Plantation, for instance, come to Connecticut’s Renbrook School with costumes for the kids to wear and hands-on demonstrations in toothpaste making. “We’ve completely tailored that in-house trip to our needs,” says teacher Susan Hildt.

And that’s what it’s all about. With time at a premium, test-makers breathing down their necks, parents worried about terrorism and bean-counters crying about the economy, it’s not always easy for teachers to take a field trip.

But it does meet a need: to excite and educate students about the world outside of their classroom doors. As the Mosby Woods kids descend the grand staircase in Gunston Hall, shocked by the lack of bathrooms, entranced by the thought of candlelight and story-telling and educated by the careful preservation of a Colonial family’s home, 10-year-old Alyiah turns and says, “I am having the best time ever!”

Mary Ellen Flannery is a Washington, D.C.-based writer.

Fourth-graders from Mosby Woods Elementary in Virginia visit the nearby Gunston Hall plantation

**REPORT TO THE ACCREDITATION COMMISSION,
AMERICAN ASSOCIATION OF MUSEUMS:**

**GUNSTON HALL PLANTATION,
Mason Neck, Virginia**

By

Kay Phillips Williams and Brock Jobe, Visiting Committee

INTRODUCTION

A visiting committee consisting of Kay P. Williams, Director of Tryon Palace Historic Sites & Gardens, as Chair and Brock Jobe, Professor of American Decorative Arts, Winterthur Museum, examined the museum operation of Gunston Hall Plantation, from Thursday, June 14, 2001 to Friday, June 15, 2001 as part of the museum reaccreditation process. The schedule began at 12:00 noon on Thursday and concluded late afternoon on Friday. The visiting committee met with Thomas Lainhoff, Director; Judy Herdeg, First Regent of the Gunston Hall Board of Regents; Karen Bazle, Museum Store Manager; Ray Bodie, Museum Interpreter; Susan Borchardt, Deputy Director for Collections and Education; Buck Jurusek, Assistant Horticulturist and Farm Manager; Christine Jirikowic, Senior Archaeologist; Denise McHugh, Education Coordinator; Linda Hartman, Education Assistant; Kevin Shupe, Librarian/Archivist; Lena McAllister, Administrative Assistant; Emily Kangas, Public Relations and Marketing Specialist; and Susan Blankenship, Development Program Coordinator. Tom Lainhoff arranged the schedule and coordinated all aspects of the visit.

Since the last review in January 1987, much progress has been made in defining the role of the Board of Regents and the Director. During this time the number of staff members has nearly doubled and salary adjustments have been made to bring staff salaries more in line with museum salaries in the region. Two education positions were added in response to a recommendation made during the last accreditation review. The mission statement has been rewritten to focus on the global significance of George Mason. Major changes have occurred in exhibits including the development of a new museum exhibit on George Mason and his significant accomplishments and the reinterpretation of the interior of Gunston Hall to more accurately reflect life in Mr. Mason's home. Planning has been strengthened with the development of a Long-Range Plan in 1994 and a new long range

planning process will be initiated in October 2001. A monumental room use plan has been completed and will be implemented in the near future. To better interpret plantation life, live farm animals are now exhibited on site and the museum is considering other ways to interpret plantation life. Archaeological research of the gardens is nearing completion and will be used to inform the decision regarding reinterpretation of the gardens. New educational programs have been added, including an exterior tour interpreting the life of enslaved African Americans at Gunston Hall Plantation.

ADMINISTRATION

Mission

The Board of Regents adopted the current mission statement in 1993. It focuses the interpretation on the "international significance of . . . George Mason". As described, the purpose of the historic site is to tell the story of Mason's contribution " . . . to the universal cause of human rights." The vision statement adopted by the Board of Regents in 1994 adds interpretation of plantation life in 18th century America as an important objective.

The result is somewhat of a mixed mission. The exhibit in the Visitor Center explores George Mason's public life and his contribution of the bill of rights to the Constitution. The regents are planning a monument in Washington, D.C. to commemorate Mason's contribution to the framing of the Constitution. However, the house museum tells the story of Mason's domestic life, and the plantation interpretation is more of a generic interpretation of plantation life in Virginia in the 18th century. It would be difficult to interpret Mason's international significance as the author of the Bill of Rights using historic room exhibits. The Board of Regents and staff have allocated significant resources of the institution to develop a more accurate presentation of the mansion and its furnishings. Obviously the reinterpretation of the mansion centers on Mason's home life more than his public accomplishments. According to Tom Lainhoff, the interest in adding farm animals evolved from staff interest in interpreting plantation life in Virginia. Unlike the mansion, the interpretation of the farm is not based on evidence of the plantation operated by George Mason. The mission as currently stated does not support the focus of the interpretation of the mansion and landscape.

Attention needs to be paid to developing a mission statement that includes the interpretation of Mason's domestic and farm life as well as his significance as the author of the Bill of Rights. The process should determine if the intent is to interpret a generic plantation of the period or to specifically interpret Mason's life as a plantation owner. A revised mission statement should make a clear connection between Mason's personal and public life. A mission statement that brings the disparate areas of interpretation together would be a guide to the regents and staff in making further plans to develop the interpretation of the landscape and farm. The upcoming long range planning process will be a good opportunity to develop a more focused mission statement.

Governance and Organization

Tom Lainhoff, the Director, and First Regent Judy Herdeg agree that there has been significant improvement in the clarification of the roles of staff members and board members. The board is much less involved in the day-to-day operations and has delegated much of the supervision of the Director to the First Regent. The staff now develops a proposed annual budget for private funds to present to the Board of Regents. In the past, the regents would approve projects subject to the availability of funds and did not really develop a firm budget. Staff members now attend many of the meetings of board committees and professional concerns are considered in setting organizational priorities and direction.

In the view of the visiting committee, there is still a need for further definition in the role of the Board of Regents and the Director in the governance of Gunston Hall Plantation. The Director estimates that about fifty per cent of his workweek is spent on board issues. Board members regularly contact staff members about operational matters without first consulting the Director. The First Regent functions very much in a hands-on mode with the Director. The board continues to meet at the Plantation for four days twice a year, and board committees remain somewhat involved in the details of daily operations. For example, a board member must view an object before it can be accessioned.

There has been a gradual move to a professionally based operation over the past decade, but it has been based on evolving practice rather than defined policy. There are numerous committees of the board, which results in staff spending much time communicating with board committees and covering their bases. For example, there is some confusion on the role of the Collections, Restoration and Research Committees. All have been important participants in the reinterpretation of Gunston Hall. The recent development of the two-volume *Room Use Study* to guide the furnishing of the mansion was a project of the Research Committee. The Collections Committee will implement the *Room Use Study*. Physical reinterpretation of the house was under the oversight of the Restoration Committee.

The current Director and the Board of Regents have had a difficult relationship that has improved through the efforts of Judy Herdeg, First Regent. She often functions as a buffer between the Director and board. This arrangement has been effective in the overall management of Gunston Hall Plantation. However, the effectiveness is dependent on the positive working relationship of the Director and First Regent. The current Director and First Regent have a relationship built on trust and respect rather than one based on underlying institutional policy.

The Board of Regents is composed of representatives from all 50 states plus 2 at large members. This structure has worked well in terms of raising money for Gunston Hall projects. Each regent has a quota to meet from Colonial Dame chapters in her state. The size of the board and the geographical distribution across the nation creates challenges in board attendance at meetings and participation in Gunston Hall Plantation events. The First Regent feels that involving the board in the day-to-day activities of the Plantation

helps to bond members to the site, but she also acknowledges a growing problem in getting busy regents to attend four-day meetings at their own expense twice a year. Successful fund raising on the part of regents is linked to the degree that they feel connected to the museum.

The issue of board development is a difficult one since the structure of the Board of Regents is mandated by the Deed of Gift donating the property to the Commonwealth of Virginia. It is a monumental task to engage the interest of 52 board members. This has been accomplished by having a large number of very involved committees. This solution has been successful in generating interest among board members, but it has resulted in the board members having an expectation of hands-on involvement in the operation of Gunston Hall Plantation. Because the regents are appointed from the membership of the Colonial Dames, there is no opportunity to have ethnic or gender diversity on the board. Recognition of this need led to the development of several advisory groups that include men as well as women and at least one group with African American participants. However, the visiting committee was told that the African American Advisory group had not met in at least a year.

Planning

The board and staff show a commitment to planning but see planning as a special event rather than an on-going process. The last Long-Range Plan was completed in 1994 for the period of 1994-1999. It was accomplished with the assistance of William Hinman, a consultant, who facilitated the process and completed the final planning document. A new, major long range planning process will be initiated in October, 2001, again with the assistance of Mr. Hinman.

The 1994-1999 Plan established standards of performance for buildings and property; collections; education; finance; gardens and landscape; library, archives and research; organization and administration; and public relations and promotions. Of the seven priorities listed, the most notable accomplishment has been the restoration of the mansion. This has become a national model for reinterpretation of an historic house museum. Much work remains in each of the other priorities: fire and security protection; improved office, storage, meeting and visitor orientation space; accessibility of site and buildings to visitors with disabilities; dampness problems in the buildings; development of a broader base for fundraising; and increased publicity and visitation.

Many staff and board activities seem to evolve in an ad hoc fashion. A variety of farm animals have been added to the interpretation of the landscape. This initiative derived from the interest of the staff and the availability of Buck Jurusek, Assistant Horticulturist and Farm Manager, who is knowledgeable about animal husbandry. He determines which animals are added, manages the day-to-day care of the collection and plans for future acquisitions. Other staff members seem uninvolved in planning for this part of the interpretation, and there has been no overall institutional planning on its development. There is no collection policy guiding the acquisition, management and care of this living collection.

Like many institutions, the organization shows a tendency to jump at opportunities rather than remaining focused on key priorities. For example, board members became interested in the possibility of a film being made on site. A decision was made to proceed with this project with little input from the staff and without an analysis of the benefits and risks for the organization or an analysis of how this project related to organizational priorities. In the end, the project was cancelled.

Gunston Hall Plantation has a surfeit of good ideas and commitment on the part of the staff and board. Everyone works very hard. However there is some lack of focus on overall priorities.

Staff

Gunston Hall Plantation has a very committed and hardworking staff. The size of the staff has grown since the last review and salaries have been improved for the Director and other key staff members. The First Regent is very interested in further strengthening salaries for all of the staff including the Director. Staff members have appropriate credentials for their positions and demonstrate awareness of and concern for achieving and maintaining high professional standards in their work. While overall staffing appears adequate at first glance, the organization is vulnerable in that essential tasks are accomplished by skilled individuals without "back-ups" on staff. Examples include the Librarian/Archivist who functions as the technical resource in computer operations, the Farm Manager who functions as the curator of the living collection, and the Administrative Assistant who does bookkeeping.

At the time of the review, there were a number of vacancies including the horticulturist, housekeeper, and executive secretary positions. Attracting and retaining clerical workers and housekeepers is difficult. Opportunities for this kind of work are readily available in the metropolitan area and the Mason Neck-Lorton area is an inconvenient commute for most job seekers interested in clerical or housekeeping jobs.

Planning for reinterpretation of the gardens is hampered by the lack of a horticulturist or a staff member functioning as curator of the landscape. An overall business manager is needed as well as a controller. Business operations seem to be the purview of the Director and the Administrative Assistant. Clearer policies are needed in the management and accounting of funds, overall assets and statistical information.

Staff workspaces are inadequate, crowded, and often shared. The Director and First Regent told the review committee of plans for an addition to the Visitor Center-Office Complex, which will relieve this problem. This project awaits release of funds from the Commonwealth of Virginia (see mention on pages 9 and 15).

Budget and Finances

Financial support of Gunston Hall Plantation is diversified with both state and private sources. The state budget fiscal year is July through June and the fiscal year of the regents is the calendar year. The state budget process is very structured with periodic audits by the state auditor's office. The last state audit was two years ago.

The Regents' Fund is managed by the Board of Regents. The Director, Tom Lainhoff, and Lena McAllister, the Administrative Assistant who does the bookkeeping, meet with the Finance Committee of the Board of Regents to develop the proposed budget for private funds. Agreements are made at the committee level. The approval of the full board is usually perfunctory. This is a change from the earlier 1990's, when the full board would undertake projects without a developed budget. Input from the Director and staff was minimal in that earlier process. At that time, private funds were allocated on a "project" basis and committees of the Board of Regents would vie for their "fair share" of the funds. Now there is less emphasis on projects and competition among committees has been reduced.

An annual audit of private funds is conducted each year by a firm hired and managed by the Board of Regents. The audit firm was in the process of completing the audit for 2000 at the time of the on-site visit. Usually the annual audit is finished in time for presentation at the April meeting of the board. The Director explained that the audit is three months behind schedule due to the lack of staff. Staff vacancies in the clerical area have made it more difficult to provide the staff support necessary for the audit process.

The visiting committee received the impression that private fundraising by the regents is ongoing and successful. The Board of Regents clearly understand the need for private funds and are very active in meeting quotas to support the Regents' Fund. The Regents have recently completed a campaign to raise eight million dollars, four million projected for endowment and four million for their capital expansion. Part of the capital funds included a commitment of two million dollars from the Commonwealth of Virginia, which has not yet been forthcoming because of a state budget crisis. The Director believes that these funds will eventually come to the Plantation.

Less emphasis has been placed on seeking grant funds. The Director noted that Gunston Hall Plantation has difficulty competing for government-funded grants because of the lack of diversity on the board and the association of the Board of Regents with the Colonial Dames.

The Director writes a monthly report that goes to all the regents detailing visitation data and receipts with a narrative update on operations and trends. There is no monthly budget report. Staff members are expected to keep track of expenditures and to check with Lena McAllister on balances for funds they are managing.

Security

The Building Superintendent has security as one of many responsibilities. No staff member has security as a primary duty. There are electronic intrusion systems for buildings and grounds. Gunston Hall has a Halon fire suppression system monitored by a central station.

In the opinion of the visiting committee, there is a relaxed attitude about security on a day-to-day basis. Gunston Hall Plantation is located approximately eight miles from Mount Vernon in a very rural location adjacent to Washington, D. C. The staff works in a "family-like" atmosphere. Because three staff members actually live on site, there is a feeling of safety and security. One staff member mentioned that occasionally the office complex or the mansion are left unlocked. The Duty Officer is supposed to check alarms and locks but on occasion this has been overlooked. The reviewers believe that staff members generally care about security but did not get an impression in the interviews that the work culture included focus on security as a daily concern.

Ethics

The current Ethics Code was adopted by the Board of Regents in 1994 and appears to be comprehensive in addressing the responsibilities of board and staff members and the approach to collections and programs. No significant issues regarding ethical behavior were raised during interviews with the visiting committee.

COLLECTIONS MANAGEMENT AND CARE

Collections Management

Two issues regarding collections management surfaced during the on-site visit. The Deputy Director of Collections and Education indicated that a question had arisen over ownership of the collection. In 1982, there was a verbal agreement between the Commonwealth and the board that the Regents owned the collection. This reinforced an institutional belief that the collection belonged to the Board of Regents as a non-profit corporation rather than to the Commonwealth of Virginia. The Director said there is no question about ownership. The objects were acquired for the institution, which is a state-owned facility, and therefore the collection belongs to the state. The Commonwealth of Virginia insures the collection. When there was a theft of silver in 1981, the Commonwealth of Virginia reimbursed the institution for the loss. The reviewers were satisfied with the response of the Director.

The staff and Board of Regents are embarked on a project to deaccession and sell the majority of objects in the collection. Only those objects appropriate to George Mason and Gunston Hall Plantation will be retained. Proceeds from the auction at Sotheby's, which is planned for January 2002, will be used to acquire more appropriate objects or reproduction furnishings according to the dictates of the newly completed two-volume *Room Use Study*, the furnishings plan for Gunston Hall. Proceeds, according to the

Ethics Policy, may also be used for conservation of remaining collection objects. This proposed sale has been approved by the Office of the Attorney General of the Commonwealth of Virginia.

Role of the Board in Collections Acquisitions

The role of the board in the operations of Collections has improved in recent years. When Susan Borchardt, Deputy Director for Collections and Education, arrived in the early 1990's, she was not allowed to move any object on exhibit without approval of the board. Gradually the Collections Committee and other committees involved in collections management have come to defer more and more to the professional staff. The Collections Committee still must approve all loans but this is accomplished by mailing post cards to the members who then vote by mail. The curatorial staff can spend up to \$2,500 without Committee approval but the purchase must be approved by *three* regents who must view the object. A proposed change in the Collections Policy will increase this amount to \$5,000 and the staff must obtain approval from *one* regent who has to physically view the object. The whole committee must approve purchases above \$2,500 now and above \$5,000 in the future after the change is made. All committee members must vote on a proposed auction purchase, which is accomplished by a telephone poll. All proposed purchases must also be vetted by an outside expert.

The change in the Collections Policy will be considered at the October Meeting of the Board of Regents.

Collections Records

The museum did not create an accession record until 1983. Since 1983, an accession record has been maintained and the history of accessions prior to this date are provided in an inventory list sorted by accession number. The institution has maintained careful records according to standard museum practice. The upcoming sale will greatly reduce the number of objects in the database.

Collections Storage

Collections Storage is very inadequate. Storage areas are located in many areas of the mansion including in the cellar, in chests, and in closets. The cellar space is not environmentally controlled and the storage area is disorganized. The curatorial staff have some storage in their office area. Two of the dependencies have storage in the garrets, both areas without environmental control systems. The staff and board are well aware of the problem and have taken an important step in moving ahead with the capital campaign to fund the new expansion to the Visitor Center/Office Complex, which will include improved collections storage.

Collections Care

Daily cleaning is a problem at Gunston Hall Plantation. Housekeeping staff has been transient and unsatisfactory. Currently, the Deputy Curator of Collections cleans exhibit and collections areas. The professional and clerical staff clean office areas and do the general cleaning necessary before meetings of the Board of Regents.

Pest management is also a problem. The staff have adopted a policy of avoiding pesticides and are working to develop a strategy based on baiting and traps. The greatest problem is with cricket infestation. There is no conservator or conservation technician on staff. Condition assessments and treatments are accomplished by contracting with highly trained conservators in the region.

Library

Like many employees at Gunston Hall Plantation, Kevin Shupe wears many hats. He is the Librarian, Archivist and Information Technology Manager. As Librarian, he manages a collection of about 4,000 books in the reference collection and 1,300 titles in the rare book collection. The reference collection includes scholarly works on history, the decorative arts and other related publications. The documentary collection primarily consists of material related to George Mason. The Library does not collect materials pertaining to its institutional history, only the history of the mansion and the Mason family. The Collections Policy for the Library is currently being revised to extend the collecting period to include later Mason family material.

Two important rare books have been deaccessioned and will be sold at auction. Both were gifts of regents and the Library Committee of the Board of Regents has approved this action. Money from the sale will be restricted for purchase of rare books or manuscripts for the collection. The Library Committee generates half of the funding for acquisitions. There is a budget for purchase of smaller items for the collection. Expensive purchases outside the limits of the budget require special allocations by the Committee.

The Library has full access to the OCLC database as part of a larger state contract. The database is used for cataloguing the rare book collection as well as for staff research.

About seventy to eighty members of the general public use the library each year, primarily for genealogical research. The Library is primarily a research resource for staff, regents and specialized scholars. It is available to the public on an appointment-only basis.

Research

Research is an institutional priority. The reinterpretation of Gunston Hall required a massive amount of research, including documentary research, archaeological

investigation and architectural study of the fabric of the building. The dedication to research is so strong that one staff member said that it was difficult to know when to say a study was complete. The two-volume *Room Use Study* is a model of how to develop a furnishings plan for a historic house museum. The *Room Use Study* was approached as a probate inventory. The goal was to replicate the total contents of the house, not to focus on rooms individually. Volume I describes every possible item likely to be in the house. Volume II is the plan for what should be in Gunston Hall after it is refurnished.

TECHNOLOGY

The institution takes advantage of talented staff members like Kevin Shupe who has overseen the computerization of the organization. He is largely self-taught and assumed more responsibility as his interest and knowledge has grown. Now every staff member except the front desk staff (ticket desk) and Museum Shop staff are networked. The Museum Shop has a computerized inventory system. The Development Office is using Raiser's Edge for its membership, donor, and prospect database and the collections and research records are on a database.

Mr. Shupe also maintains the web site, which was developed by an outside designer in 1996. He uses an annual intern from George Mason University to assist with maintaining the site. The original designer is on contract for special design such as the George Mason Memorial section of the Web Site. The web site is very attractive and informative but is very slow.

The computer operation runs on a shoestring. Kevin Shupe functions as the troubleshooter when staff members are having problems with their computers or computer systems. He also tries to assess the current level of computerization and to plan for future development. He is trying to acquire two new computers each year but most staff members are using computers that are about seven years old. In general, technology has not been a high priority in the organization and was not listed as a goal in the last long-range plan. There is no technology committee of the Board of Regents. The success of the web site and initiatives to use technology are dependent on Mr. Shupe continuing in his role.

The Commonwealth of Virginia is seeking to have all records of state agencies on line and available to the public. Gunston Hall Plantation, as a Commonwealth site, is subject to the state's sunshine laws regarding access to public records. This will require more focus on technology in the forthcoming long-range plan.

INTERPRETATION AND PRESENTATION

Public Programs and Exhibitions

Gunston Hall Plantation offers an impressive array of programs for a relatively small museum. There is a serious commitment to do excellent programs. The education staff

members deserve high marks for the quality and quantity of public programs. Symposia and lectures attract scholars as well as the interested public.

An important program on American Interiors from 1607-1825 will be offered in November 2001 and will be attended by graduate students and professional scholars in American decorative arts as well as the general public. The popular Liberty Lecture series are based on bringing history into a contemporary framework. For example, the Bill of Rights provided a basis for discussing the implication of laws designed to benefit disabled individuals and members of ethnic minorities. Attendance has ranged as high as 75 to 80 people for an individual lecture. Staff members and docents are encouraged to attend these public programs which also offer recertification credit for classroom teachers. Some consideration has been given to offering the programs off "campus" in the Washington metropolitan area or in other cities across the country.

Tours of the mansion are offered daily. Outside tours interpreting slavery on the plantation are offered on Sunday afternoons. Tours focused on the lives of women on the plantation are offered once a month.

School programs are especially commendable. About 8,000 school children come with their classmates to attend a tour by costumed docents that includes living history demonstrations and hands-on activities. The children are offered a range of interpretive options including special programs like *Growing up at Gunston Hall, Land and Labor*, and *Winter on the Plantation*. The farm tour includes visiting the farm animals and the activities of farming operations.

Museum interpreters receive about 30 hours of formal training. These paid interpreters, who do not wear costumes, provide daily tours of the mansion. In the winter, one interpreter is on duty in the mansion and two in the spring summer and fall. Each interpreter gives an average of 5 tours a day in the busier months. There is a core of about 15 trained interpreters to provide daily staffing for the mansion.

The exhibit in the orientation gallery considers the role of George Mason in framing the Bill of Rights and explores his impact on the developing concept of human rights. The exhibit is text-oriented with displays of artifactual material. Space has been allocated for the development of a future interactive exhibit to further explore this topic.

Volunteer Interpreters

School tours are led by costumed, volunteer docents who are members of the Gunston Hall Docent Association. This organization recruits, trains and costumes volunteers to do cooking demonstrations for special events, conduct tours for school groups including "touch" activities in the cellar of the mansion, and to assist with other needs at the museum. Staff members generally oversee their training and tours, but the Association functions very independently. The Association has its own Board of Directors and Bylaws. A 350-page docent manual was prepared in recent years to help to organize and structure the operation of this 60-70 member organization. Recently male docents were

added to the membership, and there is some awareness of the need to recruit African American participants. Currently the membership of the Association is largely female and white.

Another important group of volunteers are the Gunstonians. This group consists of costumed interpreters who do first person interpretation, primarily at special events. This living history organization began about eight years ago. Recruits receive one day of training by education staff members and attend a workshop once a year. The players have a structured monologue followed by in-character interaction with visitors. The Gunstonians provide their own costumes, which are approved by the staff. A policy with written standards for clothing, hairstyle, make-up and accessories covers all costumed interpreters. Staff support for the Docent Association and the Gunstonians are provided by the Education Coordinator and Education Assistant.

Historic Room Exhibits

The reinterpretation of Gunston Hall is a remarkable achievement. Extensive research has been done on the interior finishes of the building, including installing period appropriate wallpaper and restoring glazed painted surfaces and carved woodwork. The result is a much more accurate presentation of Mr. Mason's mansion. In the opinion of the reviewers, the staff and board members have not fully received the credit they deserve for this accomplishment.

The commitment to accuracy has led to the decision to readdress the furnishing plan for the house. The recently completed *Room Use Study* shows the same commitment to scholarship as the reinterpretation of the building fabric. Refurnishing the house with reproductions will allow a more natural flow for the tour of the mansion and will eliminate the need for barrier ropes.

There is some effort to tell the story of enslaved individuals in the Mason household. In the Study, a chair turned upside down is exhibited in the process of being repaired. This gives the interpreter an opportunity to talk about servants and the presence of enslaved African Americans on the Plantation. Interpreters who provide guided tours are also trained to do the Slavery Tour.

The Landscape

The interpretation of the landscape presents a significant challenge to the staff and board. Overgrown boxwoods dominate the approach to the mansion from the river and obscure the original design. The boxwoods are more than six feet tall and cover an extensive area, reducing Mr. Mason's broad avenue leading to the mansion to a path three or four feet wide. Recent archaeological investigation has discovered that the original planting border corresponded to the width of the central passage of the mansion. Planted by George Mason, the boxwood allee has disappeared in the spread and regeneration of the original plants. The dilemma is whether to remove the original plants and restore the landscape installed by Mr. Mason. The options are to generate new plants from cuttings

taken from the original boxwood to restore the landscape plan or to allow the boxwood maze to continue to grow and spread.

Archaeological investigation of the landscape is nearing completion and has revealed the dimensions of the original avenue to the mansion, other possible paths, and additional garden features including fanning of the walk to surround the portico of the house. The regents will consider the results of the study at the October 2001 meeting as well as a recommendation from the staff that the overgrown boxwood be removed and cuttings generated from the original plant material be planted to re-form the allee that Mr. Mason knew.

Serious consideration of the interpretation of the landscape has begun much more recently than interpretation of the mansion. The board and staff are to be commended for approaching landscape questions with concern to do the necessary research. Consideration of the archaeological and documentary evidence will likely lead to the same bold and innovative approach to the landscape that has made the reinterpretation of the mansion so successful.

AUDIENCE

Attendance

Attendance has been flat or declining for the past decade. Actual annual attendance was 47,946 in 1990 and 40,198 in 2000. Average attendance from 1972-2000 was 43,426. The highest annual attendance in this period was 50,886 in 1980. Increasing attendance was a goal of the 1994-1999 Long-Range Plan, which called for developing a marketing plan. To date, attendance has not received the kind of attention and focus that have made other goal areas a success. Given the location of the Plantation near major interstate arteries and the proximity of a large metropolitan area, a strategic plan to promote the site would likely boost the annual attendance numbers and increase revenues from ticket and retail sales. The reviewers were told that the low attendance numbers result from all the competition in the Washington area, including the competition from Mt. Vernon. Overtures to the Director of Mt. Vernon on joint promotions have generated little interest. About two per cent of the visitors come from the DC area, although visitors who come from other regions may be vacationing in Washington.

Audience studies indicate that the site attracts few African Americans or members of other ethnic minorities. With the potential to further expand on the universal themes associated with George Mason's life and the opportunity to tell more of the stories of African American life, the site should have broader appeal.

Outreach programs are very impressive. Approximately 4,000 children benefit from docent led classroom discussions. Many more children benefit from published lesson plans, which are made available to classroom teachers. Staff members regularly make

presentations to adult groups. The web site provides extensive information as well as material for classroom use.

Assessment

Surveys are conducted during special events but there has been limited study of daily visitation. The attendant at the ticket desk distributes simple survey cards but few are returned. Staff members conduct extensive evaluation of special event audience and special groups, but they have not been focused on the individual visitor. The quality of the visitor experience in general is not measured or evaluated.

Publications

Brochures and promotional literature are professionally designed and printed and are very appealing. The extensive research on George Mason, the mansion and its furnishings have provided material for booklets and more scholarly works. The Probate Inventory Database on CD-ROM will soon be available to scholars and is currently available on the Gunston Hall web site (although this site is difficult to access). The previously mentioned lesson plans entitled *Discover George Mason (grades 3-6)* and *George Mason, Planter and Patriot (grades 7-12)* are full of information and activities to supplement classroom learning in social studies.

Marketing and Public Relations

Emily Kangas, the new Communications Director, was hired in October 2000. She has a background in promotion and was formerly with a Washington public relations agency. She is currently developing a strategy to make George Mason and his home more familiar to the American public. Her goal is to publicize Gunston Hall Plantation in its entirety by developing and maintaining an extensive mailing list to support direct mail campaigns; by branding its image; and by targeting families visiting the Washington area. The staff and board have good intentions about increasing attendance, but there has been no clear strategy with specific goals. The dilemma is how to make the public *care* about George Mason-- how to brand Mason and his Plantation. She may use focus groups to determine the appeal of George Mason and Gunston Hall.

Ms. Kangas is currently redesigning the rack card to focus on George Mason, who he was and why he is important. She is also interested in targeting the national media with a "George Mason" approach leading up to the dedication of the George Mason Memorial in Washington on April 9, 2002. C-Span has already shown some interest.

Her predecessor concentrated on the group tour market even though adult group tours were a small part of the overall tourism picture. Since marketing funds are limited, a decision was made to stop attending group tour marketplaces and to rely on the Tourism Office in Alexandria to promote Gunston Hall Plantation to the motor coach industry.

The staff of Gunston Hall Plantation work with the staff of Woodlawn and Mt. Vernon to promote the area. To date, Mt. Vernon has shown very little interest in joint promotions or in helping steer its large visitation to nearby Gunston Hall. Mt. Vernon represents both a challenge and an opportunity. Visitors interested in an historic attraction will go first to Mt. Vernon. The challenge for Gunston Hall Plantation is to be the other historic attraction they visit.

Development

The former Development Officer also handled marketing and public relations and focused primarily on earned income through ticket and retail sales. Having a staff member to focus on development was a change that occurred when Susan Blankenship was named to her current position. Her specific job is fundraising and membership development. The membership program has increased 12 per cent in the last year with just under 5,000 members. The primary prospects for donations are board members, former board members and members of the Colonial Dames organization. A major funding organization is the Boxwood 100, an exclusive membership organization. About 30 members were grandfathered in at a minimum of \$2,500 a year. The group has about 50 members now and are building to a maximum of 100 members. A regent committee is currently working with an attorney to establish a planned gift program for the future.

Members of the Board of Regents Development Committee work closely with Ms. Blankenship. They regularly make calls on prospects with her and actively lobby the state legislature. A special campaign was directed at descendents of George Mason which brought in about \$100,000.

The Capital Campaign lacks only the funds promised by the Commonwealth for the expansion of the Visitor Center/Office Complex. The Secretary of Education has assured them that the frozen funds will be forthcoming in time for a 2002 groundbreaking.

CONCLUSION

It has a remarkably dedicated staff and board who have made significant contributions to scholarship on historic architecture and furnishings. Much progress has occurred in the period since the last review, especially in the area of interpretation of the mansion, clarifying the roles of the board and staff and developing a budget process for private funds. Professionalism of the staff has grown in the last decade and professional issues are being thoughtfully addressed. In summary, there has been tremendous improvement in the last decade, but there is a need for further work to be done.

The Board of Regents and staff of Gunston Hall Plantation are to be congratulated for their stewardship of George Mason's remarkable home and plantation. They are embarking on a long range planning process to take Gunston Hall into the new century. This will provide a good opportunity to address many of the points in this report.

Starting to Take Shape

Out with the Old, In with the Authentic

When five years of intensive archaeology and scholarly research discovered that George Washington's most famous and beloved garden was proven inaccurate there was simply one choice. "As much as we loved the garden walks, the massive boxwood plantings, and the arrangement of the flowers," noted Dean Norton, longtime horticulturist, "we had to remain true to George Washington and his designs."

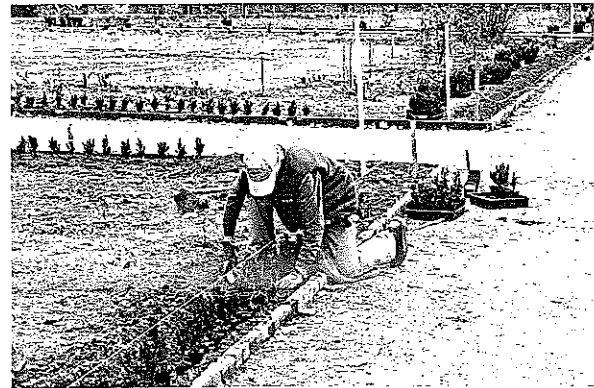
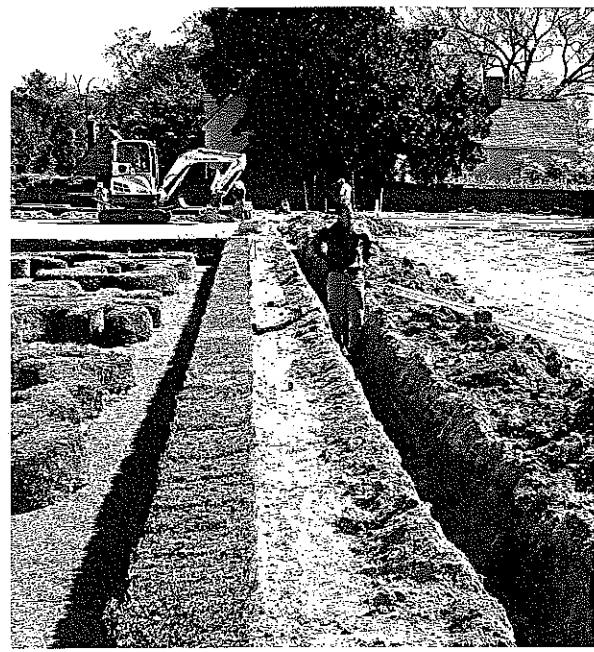
Ultimately, that decision resulted in the removal of about 70 percent of the existing paths and plants. Only the pair of French-inspired parterres and a few fruit trees remained.

Archaeologists discovered evidence that there were far fewer paths, but those that existed were significantly wider. With this critical revelation, horticulturists realized that flowers were planted in a border that surrounded large cultivated beds with vegetables grown in the center. Washington's knack for blending the beautiful with the practical was well-proven.

Because the gardeners wanted to assure that bulbs planted over the years would not pop up where they shouldn't in the restored garden, they dug deep, removing bulbs from the past. It took over 250 cubic yards of fresh soil to restore the garden to its proper grade.

After new irrigation lines were established, Mount Vernon's gardening team staked out the borders, established new pathways, and began the arduous task of installing some 3,381 boxwood which will be kept low to 18th-century specifications.

"Washington wanted his guests to enjoy beautiful flowers, but did not want to sacrifice invaluable space for the production of vegetables," said Norton. "Mount Vernon gardeners will continue to fine tune the garden this spring and summer, and by spring of 2012, Washington's plan should really be in evidence."



Top, grounds manager Mike Elliot installs a new irrigation system in the newly restored upper garden. Above, Judith Menseh plants boxwood edging during the exact same week that Washington's gardeners planted "box edging in the High garden" in 1798. Below, over 250 cubic yards of top soil was trucked into the upper garden to bring the new garden beds to the correct planting level. All photographs by Dean Norton



From left to right Judith Menseh, Ed Harrington, Peggy Bowers, Dan Scott, Kristen Gauthier and Matt Peterschmidt, celebrate the replanting of the restored upper garden.



American Association of Museums

Frequently Asked Questions

How many people visit museums in the United States? Which type receives the most visitors?

AAM estimates that American museums receive 850 million visitors per year.

AAM's *2009 Museum Financial Information* survey found that the median annual attendance for different types of museums is as follows:

Art Museum	44,878
Children's/Youth Museum	130,870
General Museum	58,500
Historic House/Site	11,700
History Museum/Historical Society	10,000
Living Collections	208,574
Natural History/Anthropology Museum	58,176
Science/Technology Center/Museum	357,103
Specialized Museum	22,000

<http://www.aam-us.org/aboutmuseums/abc.cfm#visitors>

A MESSAGE FROM THE FIRST REGENT OF GUNSTON HALL

The Regents of Gunston Hall met for their semi-annual meeting over the weekend of April 13-16. With the departure of David Reese as Director, Mark Whatford, who has served as our librarian, archivist, and IT specialist, agreed to step in as Acting Director. New Jersey Regent-at-Large Sara Hill is heading the search committee which will choose a successor to Mr. Reese.

Over the past year the Regents have been working hard at a 360° analysis of Gunston Hall. We have worked closely with the Office of the Secretary of Education and the Commonwealth of Virginia Board of Visitors in an effort to make our work more transparent and understandable to the public. In addition, we have engaged the services of outside professionals in order to understand the issues as objectively as possible.

We are happy to share with the community, the legislature, and most particularly the many devoted supporters of Gunston Hall Plantation, initiatives which are well underway.

Education: With unanimous agreement that education is a fundamental component of Gunston Hall's mission, we and the office of the Secretary of Education recognize that Gunston Hall can strive for a more sophisticated and advanced level of educational programming than ever before. Technology, a focus on STEM education, and a site brimming with opportunities are factors that will guide our search for a qualified Director of Educational Programming. We look forward to the input of our succeeding director in the selection of this person.

Educational Advisory Board: The Board of Regents welcomes and embraces the suggestion of the Board of Visitors that in building new educational programs we include the voices of educators in the community and beyond, who can share the wisdom of their hands-on experience. Input can come from educators in schools as well as other institutions and include government, history, civics, and the arts.

Educational Outreach: Our Education Committee recognizes economic and logistical obstacles which limit the opportunity of many students and schools to enjoy field trips and onsite education. The Committee is exploring ways in which Gunston Hall can fund transportation, bring programs to the schools, provide distance learning, and find other creative ways to assist.

Employee Resources: The Governance Committee is working with the Commonwealth of Virginia and other Virginia museums in order to make available to all employees user-friendly employee handbooks. As the complication of having both Commonwealth and private employees at Gunston Hall has made this a challenge, we are focused on fully addressing the needs and rights of all employees.

Community Outreach: There are many events currently on the calendar and we anticipate many more to come. Gunston Hall wants to welcome all who are interested in learning about George Mason and his contribution to the cause of human rights. Employees, Regents, and volunteers cherish and wish to share this magnificent historic site. We look forward to

welcoming all who can come on June 12th, George Mason Day, celebrating the anniversary of his signing the Virginia Declaration of Rights.

Guidebook: Many have asked for a new guidebook which will be available in the museum shop shortly. Renowned photographer Steven Brooke, engaged by Director Reese, spent three recent days at Gunston Hall; his remarkable work will be included in the new guidebook as well as other promotional and educational items we can offer.

Financial Transparency: The finances of Gunston Hall have always been public. However, an inability to easily and accurately access this information has led to false and inaccurate reporting of those finances. We welcome the opportunity for everyone to easily and accurately see the factual reality: that reduction in funding by the Commonwealth of Virginia has been dramatic; that Regents and other private sources have raised inordinate amounts of funds to protect the treasure that is Gunston Hall; and that Director Reese cultivated substantial grant monies resulting in priceless capital improvements.

Board of Advisors: The Board of Regents can and should benefit from advice offered by individuals with expertise in areas relevant to the Plantation. We look forward to restructuring our advisory committee to include individuals in the areas of historic preservation (particularly architectural), landscape architecture, fine and decorative arts (specifically American), historic site or museum management, American history, African American history, a Mason descendant, an individual with legislative expertise, and a member of the local community.

Museum Standards: Accreditation by the American Association of Museums is highly coveted and difficult to achieve. Gunston Hall can be proud to have attained and maintained this precious status. As we move forward with new ideas, plans, and initiatives, regard for this most important standard will always be honored.

I would like to pay tribute to the docents, volunteers, and most especially the employees of Gunston Hall. Of the many individuals who have worked diligently for the betterment of this Plantation through difficult times, they deserve huzzahs from all of us for their loyalty, dedication, and generosity of spirit. They are, indeed, the magnificent face of Gunston Hall.

With thanks and appreciation,
Wylie Raab, PA Regent