

general management plan

HARRY S TRUMAN

NATIONAL HISTORIC SITE / MISSOURI



RECOMMENDED:

Norman J. Reigle, Superintendent
Harry S Truman National Historic Site

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John W. Bright, Assistant Manager
Denver Service Center

March 24, 1987

APPROVED:

Don H. Castleberry, Regional Director
Midwest Region

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GENERAL MANAGEMENT PLAN



HARRY S TRUMAN
NATIONAL HISTORIC SITE
Missouri

PREFACE

The National Park Service published a draft General Management Plan and Environmental Assessment (GMP/EA) for Harry S Truman National Historic Site and placed it on public review in September-October 1986. Briefly, the draft plan proposed

acquisition, preservation, and adaptive use of the George and Frank Wallace and Noland/Haukenberry homes*

creation of a private, locally managed Truman neighborhood trust to acquire and manage preservation interests in 33 additional structures visible from the Truman home and grounds*

expansion of the existing national historic site boundary to include the historic neighborhood setting of the Truman home, including the George and Frank Wallace homes, the Noland/Haukenberry home, and the 33 additional structures mentioned above*

leasing of facilities to adequately treat and store the thousands of items in the site's museum collection

continued cooperation with the city of Independence in use of the city tourist shuttle, which provides regularly scheduled service between a central staging area at Independence Square and numerous historic attractions, including the Truman Home

retention of the current home tour schedule and format

In their review of the proposals and alternatives, the public commented mainly on the proposals to expand the boundary and establish a trust to protect the Truman home's setting. While there was wide support for the acquisition and preservation of the Wallace and Noland/Haukenberry homes, public opinion was divided as to whether any further neighborhood protection was desirable. Of the 160 people submitting written comments, approximately half supported expanding the boundary beyond the four Truman-related structures and half objected to it. The great majority of the people who supported the more extensive boundary change called for direct National Park Service management of preservation easements in the expanded historic site (alternative 3), rather than endorsing the proposed concept of a neighborhood trust.

From the analysis of the public comments it was apparent that the National Park Service did not adequately explain the intended role of the trust. Comments tended to reflect the opinion either that the proposed trust would have too much legal authority or that it would have too little authority to adequately protect the expanded national historic site. Two of the major criticisms of the proposal in the draft plan were (1) that it

*Proposals requiring legislation.

would result in a loss of local control over part of the community and (2) that individuals or institutions might lose their private properties through condemnation proceedings. In fact, the trust was conceived as a way of reinforcing local control, and it was not proposed to be empowered with condemnation authority. The National Park Service recognized that the most significant contributors to neighborhood protection will always be the local residents and that condemnation would not be the most effective means of preserving the Truman home's setting.

As described in the draft plan, the easements acquired by the trust would allow normal structural modifications and paint choices, as well as conversion of single-family residences to multifamily use. They would be similar in their requirements to the current City Ordinance 7917, which establishes standards by which the city Heritage Commission evaluates all proposed changes to properties inside the heritage district. The major differences would be that property owners would either be reimbursed for the value of the rights sold to the trust or receive certain tax benefits if such rights were donated, and that the easements would run with the property.

The legislation to establish the trust and include 33 additional properties within the boundary of the national historic site might be separate from the legislation to acquire the Noland/Haukenberry and Wallace homes, since the two legislative actions would have different purposes. The National Park Service would seek to acquire and manage the Noland/Haukenberry and Wallace homes, but the remaining properties inside the boundary would be intended to remain in private ownership under local control.

The success of the Truman neighborhood trust would depend on strong commitments from district residents and local authorities. The citizens and officials of Independence have demonstrated their ability to make such commitments through their support for the creation of the Harry S Truman Heritage District, the initiatives taken by many individuals to protect the properties in the district, and most recently the city council's resolution "to work closely with the United States Park Service to insure that the area surrounding the former President's home continues to be maintained in an appropriate fashion" (resolution passed by the city council on October 20, 1986, reprinted in appendix D of this document). In this resolution, the city formally supported acquisition of the Wallace and Noland/Haukenberry homes, opposed any federal ownership of additional homes in the Truman neighborhood, and opposed either the federal government or the trust having the right to purchase easements or condemn private property near the Truman home. The National Park Service agrees with the council that neither condemnation nor federal ownership is a desirable solution to the problem of incompatible development in the area visible from the Truman home. It also agrees that condemnation authority, an inherent prerogative of the federal government, is not appropriate for the trust, and that it should not be employed by the National Park Service within an expanded national historic site boundary except in dire cases, such as when a property is threatened with demolition and the trust cannot resolve the situation.

The National Park Service still believes that a preservation trust, rather than local regulation alone, is a more adequate method for protecting the Truman home's setting. Therefore, as will be described in detail in the following plan, the National Park Service continues to propose the Truman neighborhood trust as a way of reinforcing and helping ensure the success of the city's historic preservation efforts. The midwestern, middle-class neighborhood that Truman walked and loved is a nationally significant resource worthy of protection. However, the character of this neighborhood will best be preserved not by federal management but by local residents working together actively to maintain their community and cultural heritage.

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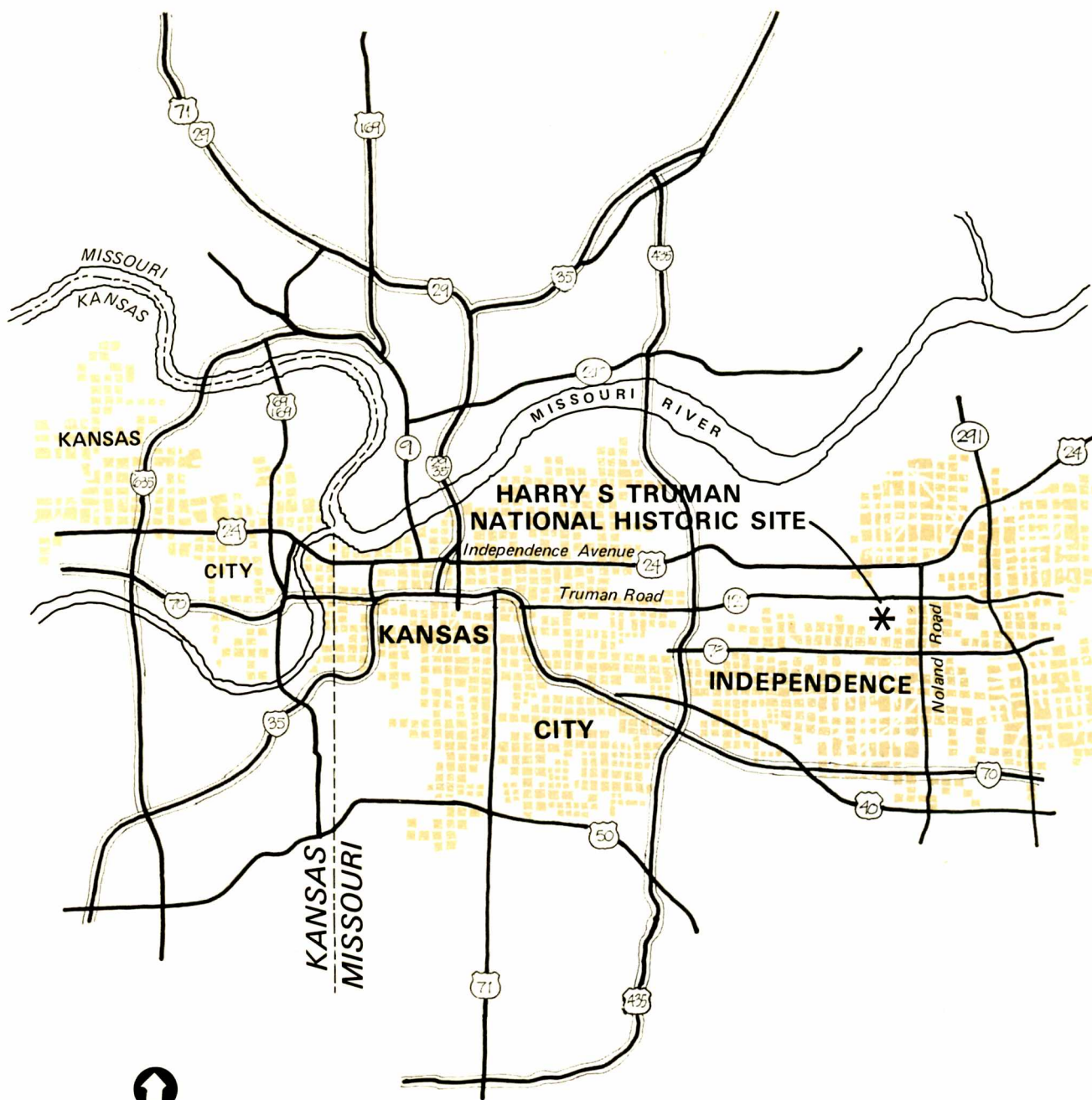
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NORTH - NO SCALE

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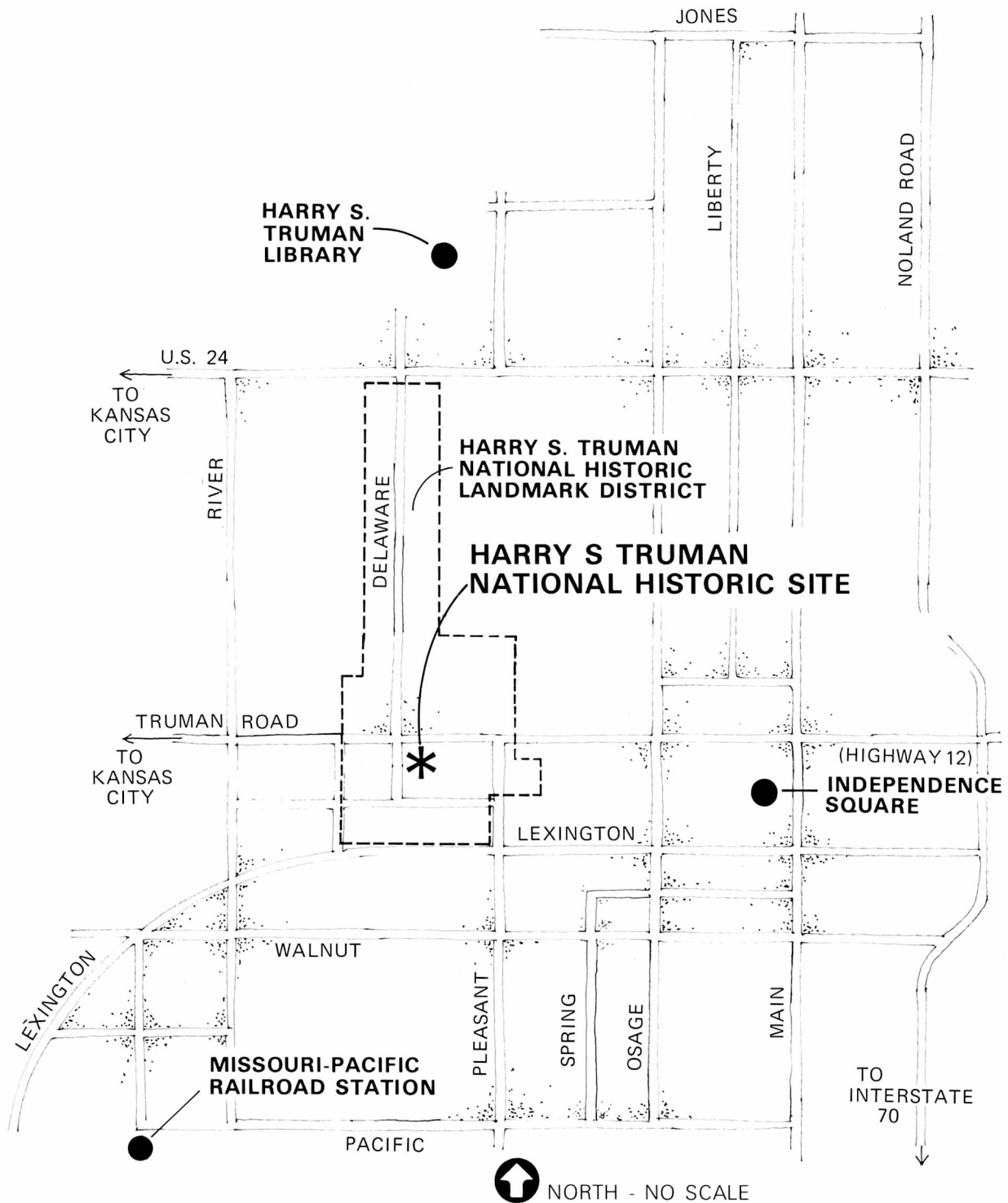
INTRODUCTION

Harry S Truman National Historic Site is a new unit of the national park system. The 0.77-acre site consists of the Truman home and lot at 219 North Delaware Street in the city of Independence, Jackson County, Missouri. The national historic site was authorized by Congress on May 23, 1983, to "preserve and interpret for the inspiration and benefit of present and future generations the former home of Harry S Truman, thirty-third President of the United States" (PL 98-32, 97 Stat. 193, reprinted in appendix A). Mrs. Bess Truman willed the home and most of its contents to the United States on her death in 1982. Under the terms of the will, the area above the first floor is not to be available for public use during the life of Margaret Truman Daniel, and the manner in which the home is used during the lifetime of Mrs. Daniel must be approved by her.

With the Truman site, the national park system now contains 27 presidential sites. As a nation, we value the homes of our presidents not only as commemorative sites but also as a means of understanding those who gained our country's highest office. And people's homes do, indeed, tell us much about themselves, especially when they are viewed in their full social context.

President Harry S Truman's home is notable for being a gracious old Victorian house that had been in his wife's family for three generations and for being an integral part of a midwestern, small-town, middle class neighborhood. It was part of a family compound shared with the residences of two of his brothers-in-law and their wives, and it was across the street from the home of his aunt. This environment both reflected and influenced Harry S Truman's values concerning his family, his neighbors, and his community--all of which were inseparable from his concept of "home." These values were a characteristic mark of the Truman presidency.

The essential link between Harry S Truman and the neighborhood where he lived has been recognized through the creation of the Harry S. Truman National Historic Landmark District. The district, which encompasses an approximately one-block-wide buffer zone surrounding the Truman home and a 0.7-mile-long corridor linking it with the Harry S. Truman Library, was established by the secretary of the interior in 1972 under the authority of the Historic Sites Act of 1935 (see the Location map). The designation was based on the historic character of the neighborhood and the fact that the neighborhood environment is important to the Truman domestic history. The official district nomination form described the neighborhood as "the setting which has been the physical nucleus of both Harry S Truman's personal and his long and influential political life." Harry S Truman, himself, said it more simply: "I always came back to Independence every chance I got because the people in Independence . . . had been responsible for sending me to Washington. And that's why when I ended up at the White House, after I had finished the job, I came back here. This is where I belong."



LOCATION

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Together the national historic site and the surrounding national historic landmark district offer the opportunity to interpret the story of Harry S Truman's home life in Independence. By understanding his home life and his relationships with his family and neighbors, visitors will also gain a greater understanding of the Truman presidency, since the resounding theme of the Harry S Truman domestic story is the unity that existed between his personal values, his family life, his citizenship in the community, and his political career.

RESOURCE MANAGEMENT

Treatment of the Truman Home and Grounds

The preservation of the Truman home and its contents will remain the highest priority for the national historic site. This is the primary emphasis of the NPS management objectives, as well as the central tenet of the 1983 legislation that established the site.

When the National Park Service assumed responsibility for the Truman site, the home, some of the objects inside, and the grounds were deteriorating. Several preservation actions were necessary immediately, and planning for others had to be set in motion, to prevent irreversible loss. A "Resource Management Plan," prepared in conformance with the NPS "Cultural Resource Management Guidelines" (NPS-28), identifies a number of specific preservation projects, which are summarized below. Some of these projects have already been completed, and others are underway.

Since acquiring the home, the National Park Service has taken immediate action to restore and preserve the building and to provide safe conditions for tours. The first-story and porch floors have been reinforced to bear a load of 100 pounds per square foot, all the electrical wiring has been replaced, the metal components of the roof have been repaired, and some of the walkways have been replaced. The home's exterior structural components and surfaces have been completely rehabilitated.

A "Historic Structure Report" identifies additional long-term preservation needs. The report describes the home's history and significance and includes the drawings of existing conditions and the recommendations for treatment. The goal will be to maintain as much of the home's historic fabric as possible, including floor and wall coverings. The "Historic Structure Report" also provides more complete information for interpreting the home. Ultimately, a historic structure preservation guide will be prepared to guide the routine maintenance practices necessary to care for the home.

The Truman home was fully furnished in 1982 at the time of Mrs. Truman's death. It contains an estimated 35,000 objects from the many generations of the Gates/Wallace/Truman families who occupied the home. The National Park Service has a responsibility to interpret the home with its furnishings in an objective, well-documented manner, as close as

possible to the way the Trumans left it. The restoration and maintenance of historically accurate furnishings is being guided by a "Historic Furnishings Report." The report provides a permanent record of object locations within the home, which will aid interpretation, facilitate security checks of objects, and give the curatorial staff a fixed arrangement of objects to maintain and preserve. The intent of the furnishings plan is to retain the appearance of the home as if the Trumans had just walked out for a moment. Objects not displayed in the home--a large portion of the collection--will be stored in a separate building (see "Collection Management and Storage," below).

A new air-conditioning system has been installed to provide suitable temperature control to protect the artifacts from deterioration and to make the tours comfortable. Ultraviolet filters have been installed on all the home's windows to prevent deterioration of surfaces and objects inside the structure. A comprehensive intrusion and fire detection system has been installed, and the home and carriage house have been protected from lightning strikes. The "Resource Management Plan" will outline a study for monitoring the effects of the noticeable vibrations caused by large-truck traffic on Truman Road. Additional action may be needed to protect the home from this potential source of damage.

The "Resource Management Plan" addresses the carriage house and grounds as well as the home and its contents. It proposes to stabilize the carriage house and to maintain its appearance consistent with the time period of the Truman home's recent rehabilitation. Consistent with this determination, the historic carriage house will not be used in any manner that would conflict with its historic use and appearance. This precludes public use because any public activity around the carriage house would conflict with the historic backyard scene visible from the back porch of the Truman home.

A cultural landscape report is being prepared to guide the reestablishment of the lawn and other vegetation as they were when the Trumans were actively maintaining them. No new structures that would be out of context with this period will be allowed on the grounds. This precludes construction of a bus-stop-type inclement-weather shelter in front of the home or on the exterior walks.

Collection Management and Storage

In accordance with the site's enabling legislation and Bess Truman's will, the National Park Service has acquired approximately 35,000 objects comprising the fixtures of the Truman home and the personal property associated with it. The park staff will continue to supervise the work of cataloging and treating the objects and evaluating their history, potential for interpretive use, and place in the collection. Unless new or reallocated funds or staffing are made available to contract or perform the curatorial work, it will take approximately 25 years to complete this work on a time-available basis. To speed completion of these critical tasks, much of the registration and cataloging will be accomplished under

contract. This is projected to take five years at an annual cost of \$20,000. Trained park staff members will perform routine preservation, and professional conservators will be contracted to perform more advanced and complex techniques. A collection management plan will be prepared to establish priorities for curatorial work and to guide the routine housekeeping and cyclic maintenance of the collection. The goal will be to initially treat and catalog all of the objects in the Truman home collection in five years.

To protect the incalculable monetary and historical research value of the artifacts, the bulk of the collection will be stored in a climate-controlled, intrusion-proof, and fireproof structure separate from the Truman home. A permanent storage facility large enough to hold the objects not displayed in the home will be leased for this purpose. All objects in the collection will be professionally documented before removal for treatment and storage.

Archeological Surveys

Archeological surveys of the national historic site will be conducted for each future ground-disturbing project to avoid the loss of historic subsurface resources. In the future, funds will be requested for a comprehensive archeological survey to comply with section 110 of the National Historic Preservation Act of 1966, as amended.

Site Protection

Preservation of Adjacent, Historically Significant Structures. The National Park Service will seek legislation to include the three historically significant structures adjacent to the Truman home--the Noland/Haukenberry home and the two Wallace homes. These structures will be acquired in fee by the National Park Service, and their exteriors will be preserved and interpreted as part of the Truman family story. The significance of these structures to the Truman domestic history warrants the historically accurate preservation and constant maintenance of their facades and grounds. This work can most effectively be accomplished by the National Park Service, since the strict standards involved in this treatment would exceed the interest and capability of most homeowners. To protect all three buildings from loss or deterioration, they will be acquired in fee, with life estates offered to the present owners. Each home's exterior will be preserved and maintained by the National Park Service as it appeared in the period of the Trumans' later retirement years.

The Noland/Haukenberry and the George and Frank Wallace homes will be adaptively used for visitor support and park operations. Adaptive use will contribute to their preservation by ensuring their long-term usefulness and economic value. This will be consistent with the national policy to "encourage the public and private preservation and utilization of all usable elements of the Nation's historic built environment" (section 2(5) of the National Historic Preservation Act as amended in 1980, 16 USC

470 et seq.) and with the policy to accommodate federal agencies in buildings of architectural or cultural significance wherever feasible (Public Buildings Cooperative Use Act of 1976, PL 94-591).

The interpretive potential of the Noland/Haukenberry and Wallace homes will be evaluated once they are under NPS management, and interior modifications for visitor use and management purposes will be limited as much as possible to protect the significant features of the buildings' interiors. If the contents of the homes become available, they, too, will be professionally evaluated for use in interpretive programs at the national historic site or at other Truman sites. The National Park Service will purchase or accept donation of items meeting the guidelines of the site's approved scope of collections statement.

Preservation of the Neighborhood Setting for the Truman Home. Besides the Noland/Haukenberry and the two Wallace homes, 33 additional structures are highly visible from the Truman home. Congress will be requested to include these properties in the national historic site boundary to protect the Truman home's historic setting. The legislation will authorize the acquisition of historic preservation interests in the nonfederal properties within the new boundary and establish a private nonprofit trust to carry out the acquisition and management of these interests. The objective of this action will be to allow for continued private residential and commercial use while avoiding any further loss of historic structures or introduction of incompatible features in the area prominently visible to visitors from the Truman home and its grounds. This legislation may be separate from the legislation to acquire the Noland/Haukenberry and Wallace homes.

In most instances the trust will acquire only the minimum interest necessary to achieve this objective. In other instances it will purchase the property in fee, then sell or lease it back, retaining the necessary interest. Most properties will be expected to remain under individual ownership, and owners will continue to pay local property taxes. If some properties are leased back, rather than sold back, or if the preservation easements retained by the federal government decrease the assessed valuation of a property for tax purposes, the federal government will make payments-in-lieu-of-taxes to compensate the local taxing authority for any difference in income. The authority to make these payments will be included in the legislation.

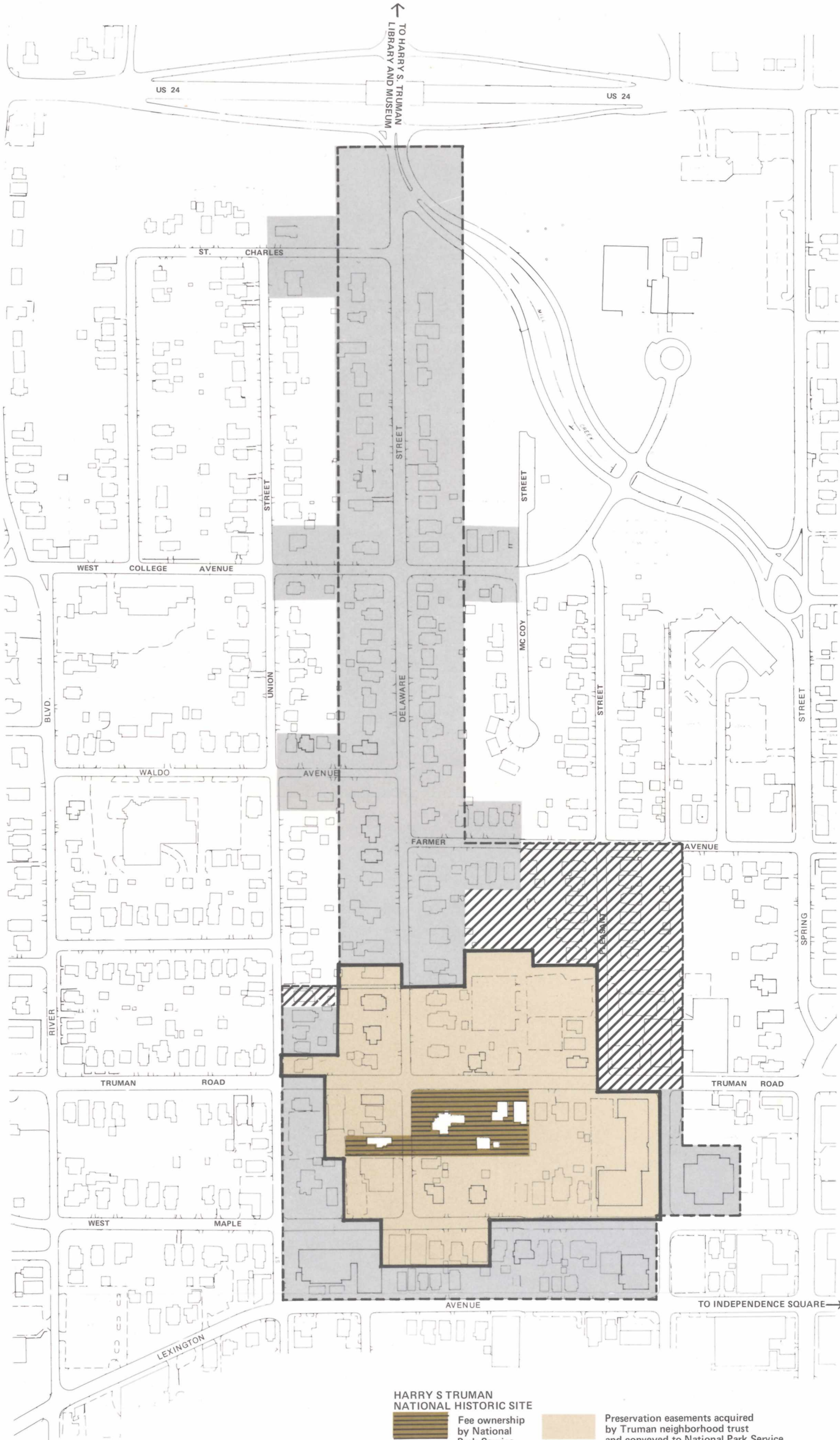
The Truman neighborhood trust will be tailored to be consistent with the laws of the state of Missouri and will be partially funded through the federal treasury. The trust will receive a one-time funding from the federal government, but thereafter, it will support itself through the sale and lease of property, fund raising, donations, and grants. The one-time federal expenditure is estimated at \$460,000. That amount will cover three years of operating expenses and provide a start-up property-acquisition and investment fund. (The covered costs are itemized in appendix E, and the methodology used to estimate residential property values is described in appendix F).

THE PLAN

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HARRY S TRUMAN NATIONAL HISTORIC SITE

Fee ownership
by National
Park Service

Preservation easements acquired
by Truman neighborhood trust
and conveyed to National Park Service

HARRY S. TRUMAN NATIONAL HISTORIC LANDMARK DISTRICT

Formal program of technical assistance from Truman
neighborhood trust and National Park Service (entire landmark district)

Portion of district not protected under City Ordinance 7917
or by National Park Service

HARRY S. TRUMAN HERITAGE DISTRICT

Protected under
City Ordinance 7917

NATIONAL HISTORIC
SITE BOUNDARY

NATIONAL HISTORIC
LANDMARK DISTRICT BOUNDARY



NORTH — NO SCALE

The trust will be empowered to conduct the following activities within the boundary of the national historic site:

Acquire lands and interests in lands from willing sellers.

Monitor easements and neighborhood change.

Enter into maintenance and other cooperative preservation agreements.

Provide technical assistance to residents (primarily advice on preservation tax advantages and referrals for professional consultation related to preservation projects).

Raise funds and administer revolving funds to finance neighborhood preservation projects.

Seek restraint through the courts to protect a property threatened with demolition.

The National Park Service, working cooperatively with the Truman neighborhood trust, will prepare a land protection plan to guide the acquisition of properties or interests in properties within the national historic site. The plan, which will be developed with public participation, will consider each property on its individual merits to determine the exact interest to be acquired. It is anticipated that scenic easements will be sought from some property owners, while other properties might be protected through purchase/sellback or purchase/lease or through purchase of the first rights of refusal on the sale of the property. The transfer of property or interests in property will be done in the manner most advantageous to the grantor (i.e., donation, bargain sale, full value purchase, etc.).

The details of easements will also be determined by the land protection plan. Generally, the easements will meet the following objectives:

Ensure the perpetuation of the character of the property and restrict incompatible change.

Ensure the perpetuation of the easement upon transfer of title by the grantor.

Ensure control of the property's use and redevelopment following involuntary loss as a result of fire, storm, or a similar disaster.

The basic intent of each easement will be to retain the general architectural character of the building and the integrity of its grounds. Easements will be sought on all properties to ensure that no new incompatible construction occurs within the historic site boundary. Easement restrictions will not prohibit modifications; rather, they will ensure compatibility with the historic character, mass, and materials of the neighborhood. Paint choice will not be restricted except in extreme

cases. Acceptable colors will be those generally found on residences throughout the district. Easement restrictions will not limit normal structural modifications such as room additions or storage sheds; however, the maximum scale and mass of buildings and maximum lot coverage will be limited to the same standard currently applied by the city heritage district ordinance. Conversion of single-family residences to multifamily use will be acceptable; however, paving to provide adequate parking for multifamily use might not be possible within the limits of the local development restrictions of Ordinance 7917 (see appendix C). Commercial businesses will be allowed if they conform to the neighborhood standards set forth in the present city ordinance, to the land protection plan, and to any easements held on the property. Maintenance of structures will remain the responsibility of the individual property owners. Maintenance assistance could be provided by the Truman neighborhood trust through a revolving fund or through cooperative agreements when necessary.

The National Park Service will not attempt to reverse the changes that have already occurred in the neighborhood since 1972, but it may seek to minimize their impact on the neighborhood by using techniques such as vegetative screening. In working with the city, churches, and organizations, and in assisting homeowners through the programs and services previously described, the trust and Park Service will seek to retain a historic residential character within view of the home while keeping the neighborhood a viable place to live.

In the future, a residential structure in the expanded national historic site that is lost involuntarily to fire or a similar disaster may be replaced only with another residential structure. The replacement will not have to be a duplicate of the original structure, but it will have to blend with the existing architectural fabric of other structures and reinforce the continuity of the neighborhood, rather than stand out individually. Again, restrictions will be limited to the same standard currently applied by the city heritage district ordinance. The easements as determined by the land protection plan will specify the qualities of the neighborhood's physical fabric that should be incorporated into new structures.

The composition of the board of directors of the Truman neighborhood trust will be designated by Congress and will include representatives of local, state, and national interests. It is intended that strong local participation be maintained in preserving the Truman home and the properties included within the boundary. Board members should include individuals from local preservation, business, and civic groups, the Truman Library, the state historic preservation office, and the Department of the Interior.

The trust must be operated assertively by an executive staff who can be entrepreneurial in their management of property interests within the boundary of the national historic site. The executive staff must be capable of leadership that will stimulate and maintain active community involvement.

Preservation of the National Historic Landmark District. The Truman neighborhood trust and the National Park Service will work closely with the city and its heritage commission to protect the national historic landmark district. To help protect the district's nationally significant resources the Truman neighborhood trust will direct a formal outreach program of preservation assistance to private property owners throughout the district, outside as well as inside the boundary of the national historic site. The outreach program will promote the use of available preservation tools by individual residents, neighborhood coalitions, and partnerships between the private and public sectors. The major preservation tools are listed below. As shown, some of the tools will be most useful for averting incompatible land use changes or building demolition, while other tools will be most useful for encouraging neighborhood maintenance and revitalization. The roles that the trust will play in promoting the use of these tools is indicated for each item.*

Tools for averting land use change or building demolition

Protective city ordinance: Provide information about how individuals or organizations could improve the effectiveness of the city's protective ordinance through the critical issues program operated by the National Trust for Historic Preservation in the United States or through other expertise. (The National Trust program evaluates the effectiveness of city ordinances and assists local groups in ensuring that the ordinances are enforced.)

Preservation easements: Receive easements that qualify the donors for tax advantages.

Acquisition: Provide information about the program of emergency property acquisition operated by the National Trust for Historic Preservation.

Tools for encouraging neighborhood maintenance and revitalization

Technical assistance: Refer individuals to architects and engineers who specialize in historic preservation and who can provide technical assistance to private property owners anticipating or engaged in maintenance, rehabilitation, and reconstruction projects.

Historic preservation seminars and training: In cooperation with the National Park Service, sponsor and provide information about the seminars and training available from the National Trust for Historic Preservation and other expert sources.

Fund raising for maintenance assistance: Organize and promote fund-raising activities to support maintenance by low-income property owners.

*A more exhaustive survey of preservation tools and their applicability to the Truman neighborhood is provided in appendix C.

Revolving funds: Administer a revolving fund for neighborhood revitalization projects.

Tax incentives: Help existing or potential income property owners to identify the types of tax advantages available for building rehabilitation and to assess the economic feasibility of undertaking such projects.

Federal grants and loans: Identify opportunities for the city and the neighborhood to obtain federal grants (such as HUD community development block grants) and loans (such as HUD title 1 historic preservation loans) for revitalization projects.

Cooperative agreements: Enter into cooperative agreements with property owners desiring to help preserve the national historic landmark district. (If cooperative planning is undertaken for the Truman neighborhood, as proposed in the secretary of the interior's section 8 report to Congress, the results could be specific cooperative agreements between the trust and the city of Independence and private property owners.)

Strong reliance will continue to be placed on direct local control. Guidelines for neighborhood change will continue to be prescribed by City Ordinance 7917. Proposed neighborhood changes will continue to be reviewed by the Heritage Commission and approved by the city council.

MANAGEMENT ZONING

Two management zones will be designated within the expanded boundary of the national historic site. The Truman, Noland/Haukenberry, George Wallace, and Frank Wallace homes will be included in a historic zone. The remainder of the national historic site will be included in a special use zone to allow for private residential and commercial use.

VISITOR USE

The main elements in the visitor experience will continue to be public parking and reception at the Truman Home Ticket/Information Center near Independence Square, transportation between the square and the home on the city's shuttle bus, and a guided tour of the Truman home. This system of access and use was planned carefully by city and NPS personnel, with support from the Independence Chamber of Commerce, the Coalition for Tourism and Historic Preservation, and others, and it functions effectively. If either the existing information center or the shuttle bus service was no longer available, other feasible options would be reconsidered, as described in the September 1986 draft General Management Plan and Environmental Assessment. If the city discontinued its shuttle bus service, an NPS shuttle would be necessary to avoid unacceptable parking congestion in the neighborhood. An NPS shuttle would be mandatory for people who wanted to tour the home, it would be

operated for profit by a concessioner, and it would serve only the Truman home or, at most, the Truman-related sites.

The key activities the National Park Service will continue to rely on are described below.

Access and Public Reception

Initial information about the national historic site and other Independence attractions is provided through recorded telephone messages and through brochures that are available at motels and other traveler facilities. Visitors learn they can park across from the ticket and information center and make reservations there for the home tour.

At the ticket and information center, visitors learn of their sight-seeing options in Independence, including the shuttle bus tour and schedules of stops along the way. At this center they make same-day reservations for a tour of the Truman home and they view an NPS-sponsored audiovisual program and exhibits about the home and its significance. Publications available at the center include an NPS brochure about the national historic site, the city's leaflets about the shuttle bus attractions and self-guided walking tour of the heritage district, a variety of books related to the Truman story, and a single-sheet handout that is updated as necessary to advise visitors of current activities. The center is staffed by the Eastern National Park and Monument Association, city volunteers, and NPS rangers. The center is accessible to handicapped persons using wheelchairs.

Visitors are encouraged to leave their cars at the staging area at Independence Square and ride the city's shuttle bus to the national historic site. Utilization of this service helps to keep traffic congestion and on-street parking needs to a minimum in the Truman neighborhood. The city shuttle bus transports visitors to seven historical attractions in Independence, three of which relate to different aspects of the Truman story (see the Shuttle Bus Route map). There are five shuttle bus parking areas along the route. Independence Square is the main staging area, where visitors are oriented to the tour route and receive information about all the attractions.

Starting at Independence Square and the 1859 jail and marshal's home, the 6-mile shuttle bus loop takes visitors next to the Vaile mansion, then to the Harry S. Truman Library, Harry S Truman National Historic Site, Joseph Smith Jr. Historic Area, Bingham-Waggoner estate, and Jackson County Courthouse. The shuttle operates from 8:30 a.m. to 5:00 p.m. every day and stops at each site every 15 minutes. During the off-season (November through the end of March), the shuttle buses operate only between the ticket center and the Truman home.

A round-trip on the shuttle takes approximately 30 minutes for visitors who do not get off the bus. The time required to ride the shuttle and take the guided tour of the Truman home is approximately 1 hour. The

shuttle vehicles in operation now are 25-passenger, gasoline-engine buses. An overview of historic Independence and other information is provided by an audio cassette program on each bus.

To provide access to the shuttle bus system for handicapped visitors, one of the city's buses is currently equipped with a lift for wheelchairs. All visitors are discouraged from parking near the Truman home to avoid traffic congestion and intrusions on the historic scene. The National Park Service staff coordinate with shuttle bus operators in meeting the day-to-day needs of handicapped visitors.

Interpretive Media and Programs

The current Truman home tour format will be retained. Upon reaching the front of the home at 219 North Delaware, visitors are greeted by a uniformed NPS ranger at the front gate. Visitors with tickets for the next 15-minute home tour proceed with their interpreter on the walkway around the south side of the home to the back porch. The tour route covers the first floor of the home, which is furnished as it was in the post-presidential period, strongly imparting a mood of the Trumans' presence. Voluntary services such as the fresh flowers kept on the dining room table by the Junior Service League of Independence serve to retain the homelike atmosphere. Visitors see and hear discussions of the back porch, kitchen, pantry, library, dining room, foyer, music room, living room, and coatrack, then exit from the front door. Tour size is limited to eight persons. The tour route and the methods of conducting the tour are designed to provide maximum interpretive benefit while ensuring that the home and its contents are not damaged.

Visitors also see and are told briefly about the carriage house, the Noland/Haukenberry home, the two Wallace homes, and the Secret Service house as part of the Truman home tour. These buildings are pointed out to visitors from the porches and walkways of the Truman home. The Trumans' relationships with the Nolands and the Wallaces will be interpreted in greater detail under the proposal. Limited interpretive media might be installed in the Noland/Haukenberry home, which is proposed for ultimate use as a visitor support facility (see below). No other interior interpretive use is proposed for these structures.

In 1985 an NPS study identified existing and potential barriers to mobility-impaired visitors at the national historic site. Based on that study a relatively new portable device with the commercial name Stair-Trac is being used on an experimental basis to provide access for wheelchair-bound visitors into the Truman home. If two years of using the Stair-Trac shows that it effectively transfers wheelchairs between the walks and the ground floor of the home and that it is favorably accepted by wheelchair-bound visitors, it will be retained; otherwise, another system will be tried. Within the home itself, most wheelchairs in common use are able to pass through all the doorways along the tour route except the 28-inch doorway leading from the kitchen to the back porch. The door to the outside on the south side of the kitchen can accommodate

larger chairs. Visitors with unusually large chairs or who wish to enter the back porch may choose to be transferred into an available on-site NPS wheelchair that will pass through all the doorways.

After the tour, visitors exit from the front door and go directly to the front gate, where they may either begin a walking tour of the neighborhood or wait for the next shuttle bus. At present, visitors to the national historic site can take advantage of the city's self-guided walking tour of the Truman neighborhood. The city's leaflet outlines a 12-block tour of the heritage district starting at the Truman home and describes the homes, schools, and churches related to the Truman story.

With the expansion of the national historic site, guided walks of the Truman neighborhood will be offered. The walks will be scheduled several times daily, May through September. The objective will be to interpret the effects of the residential environment--the influences of friends, associates, and neighborhood institutions--on President and Mrs. Truman and their daughter, Margaret. The Truman presence in this close-knit midwestern neighborhood will be interpreted through stories of family life, friendships, social events, and the influences of school and church. In contrast to self-guided tours, personally conducted tours will allow for give-and-take interactions and attention to the safety and particular interests of individual visitors.

The first tour of the Truman home currently begins at 9:00 a.m., and the last tour begins at 4:45 p.m. The home is open seven days a week from Memorial Day through Labor Day. Then it is closed on Mondays for the remainder of the year. Mondays were selected for closure because they had the lowest off-season visitation. Maintenance and curatorial work that cannot be accomplished while the home is open for tours is deferred until these closure days.

The tours are conducted every 15 minutes when demand warrants, and most tours are filled to capacity from late May through October. If visitor use data demonstrate that a significant demand for tours is not being met, the National Park Service will reconsider the option of extending the hours of operation during the peak visitor season. The park will experiment with scheduling modifications to allow for the accommodation of school groups.

The present interpretive themes for the home tour are listed below, in order of importance:

the Trumans at home during the post-presidential years (beginning in 1953), with emphasis on their use of the house and their roles as the "first citizens of Independence"

the Truman/Wallace story from 1919, when the Trumans were married and moved into the home, until Mrs. Truman's death in 1982

the home as the summer White House, principally in 1945

the pre-Truman history of the home, 1867-1919 (Gates and Wallace families)

Two additional interpretive themes will be added to the list:

the close ties between the Trumans and their relatives who lived nearby

the relationships the Trumans shared with the residents and institutions in the surrounding neighborhood

Additional research is essential to more complete knowledge for accurate interpretation of the home and its neighborhood setting. Study of the home and its extensive collection of objects has great potential for increasing the knowledge that will contribute directly to the interpretive themes for the national historic site. In addition, there are other sources of potentially useful information, notably some of the area's long-time residents. The National Park Service will continue to work cooperatively with the Harry S. Truman Library, Jackson County Historical Society, and interested citizens in conducting oral history interviews and otherwise researching the domestic life of the Trumans in Independence.

The National Park Service will prepare an interpretive prospectus to prescribe in detail the media necessary to interpret the themes listed above. The site's "Statement For Interpretation" will be expanded to describe how the themes will be interpreted through personal services.

On-Site Visitor Services

An inclement-weather shelter and related visitor facilities will be provided at the Noland/Haukenberry home. Interpretation might be provided for visitors waiting for the bus, through exhibits or through adaptive restoration of the public use area in the home.

The National Park Service considered the adaptive use of the carriage house behind the Truman home for on-site visitor support (inclement weather shelter, restrooms, first-aid room), but it was determined that this structure was unsuitable for this use; installation of a new bus-stop type shelter on the grounds of the Truman home was also rejected.

Visitor facilities near the home will be made accessible to visitors in wheelchairs.

Relationship With Other Truman Sites

Excellent cooperation exists between the numerous agencies and groups interpreting various aspects of the Truman story in and around Independence. While the National Park Service tells the story of the Trumans' domestic life in Independence, other institutions cover different aspects of the Truman story. The Harry S Truman Birthplace State

Historical Site at Lamar, Missouri, is open to the public. The Truman family farm at Grandview, Missouri, is also interpreted; the story at the farm relates to Harry S Truman's pre-war years, when he worked for his family through his twenties. Truman's ties with Jackson County and his early political career are interpreted at the Jackson County Courthouse in Independence Square, while the senatorial and presidential years are studied and interpreted at the Harry S. Truman Library. Exhibits about the famous "whistle-stop campaign" are displayed at the Missouri-Pacific Railroad Station, also in Independence. A room where young Harry Truman attended Sunday school is preserved for public viewing at the First Presbyterian Church of Independence, and the chapel where the Trumans were married is maintained by the First Episcopal Church of Independence. Together, the various Truman sites offer a uniquely comprehensive view of a president through his private life and political career.

The Truman sites in Independence, along with other important historic resources, are strongly supported by city merchants and the local government as a way of honoring the former president and promoting tourism. The city shuttle bus tour links most of the historical attractions in the city, including the national historic site and the other Truman sites. A general introduction to the history of Independence is provided on the shuttle buses. Interpretive programs at the other Truman sites along the shuttle bus tour generally explore aspects of Truman history that are not elaborated on at the home, so there is little duplication of information presented to visitors. The following list describes the activities available along the shuttle bus route. It indicates the strong cooperation that exists between the National Park Service, the city of Independence, the Harry S. Truman Library, and others.

Independence Square*

- public reception at the Truman Home Ticket/Information Center (information/orientation, home tour tickets, publication sales, and audiovisual overview of national historic site)
- "Man from Independence" audiovisual presentation and Truman office in Jackson County Courthouse
- self-guided walking tours of Independence Square and city heritage district (brochure available)
- 1859 marshal's home and jail museum

Shuttle bus ride

- taped audio tour including information about the history of Independence, city heritage district, and Truman neighborhood

Vaile mansion

- in season, daily tours of historic 30-room mansion.

*Sites related most closely to President Truman.

Harry S. Truman Library*

- information and publication sales
- exhibits on the senatorial and presidential years
- Oval Office replica
- Truman gravesites

Harry S Truman National Historic Site*

- home tour and informal interpretation along sidewalk
- guided tours of Truman neighborhood (proposed)

Joseph Smith Jr. Historic Area

- information by representatives of Mormon church denominations

Bingham-Waggoner estate

- in season, daily tours of large historic home recalling the upper class lifestyle in Victorian Independence, and interpreting the adjacent Santa Fe Trail, the Civil War, and milling history

PARK OPERATIONS

It is the objective of the National Park Service that all functions, with the exception of ticketing/visitor reception and collection storage, ultimately be housed within the Noland/Haukenberry, George Wallace, and Frank Wallace homes. As these structures individually become available, the functions of the national historic site will be phased into appropriate spaces. The lease of the second floor of the Truman Home Ticket/Information Center from the city is currently providing adequate headquarters space. This use will continue until appropriate space becomes available in the historic structures. The first priority for the utilization of these houses will be visitor and staff support, followed by on-site maintenance and curatorial workspace, with administrative offices last. Until the Noland/Haukenberry home is in NPS management, another structure near the Truman home will be leased temporarily to provide essential on-site visitor services. The lease will be terminated when the Noland/Haukenberry home is acquired and adapted for visitor use.

The exact interior space of the Wallace and Noland/Haukenberry homes is unknown, and a comparison of available and required space may be misleading. However, initial estimates indicate that available space is adequate for park operations needs (see table 1).

A separate facility will be leased to provide curatorial work space and storage for the Truman home collection. It is estimated that 5,600 square feet will be needed for these functions (see appendix G).

Space for vehicles belonging to employees and the Park Service will be provided in existing parking lots within walking distance of the home by means of agreements with the lot owners. Employees will be encouraged to carpool or commute by means not requiring parking.

COSTS AND PHASING

The facility costs for implementing the proposal are approximately \$1,208,400 (see table 2). Implementation will also require additional staffing amounting to the equivalent of 2.3 full-time positions (2.3 FTEs) (see table 3). These include five part-time interpreters needed to lead neighborhood walking tours and a maintenance worker needed to perform scheduled building maintenance on the Noland/Haukenberry and Wallace homes. Yard maintenance will be contracted, as will the registration and cataloging of the Truman collection.

The priorities for implementing this alternative are as follows:

1. Lease a curatorial storage facility (off site) and complete the registration and cataloging of the objects in the home.

Rationale: Provides necessary protection for contents of home.

Cost: \$50,000 annual lease
 \$20,000 annual contract services (for five-year period)

2. Lease a structure near the home on an interim basis to provide critical visitor support.

Rationale: Provides facilities essential to meeting on-site visitor needs.

Cost: \$10,000 annual lease

3. Acquire Noland/Haukenberry, George Wallace, and Frank Wallace homes, granting life estates to the current owners.

Rationale: Ensures long-range protection of highly significant historic structures and meets park operations needs.

Cost: \$351,000 capital
 \$ 8,000 annual operations and maintenance
 \$ 16,000 annual contract services

4. Acquire preservation interests in remaining 33 properties within the national historic site boundary (to be accomplished by the Truman neighborhood trust).

Rationale: Ensures long-range protection of residential neighborhood critical to integrity of the Truman home.

Cost: \$460,000 initial capital from federal government

Table 1: Comparison of Required and Available Floor Space

<u>Required Space (sq ft)</u>		<u>Available Space (sq ft)</u>		<u>Difference (sq ft)</u>
Administration		Noland/Haukenberry home	2,000	
office	2,700			
storage	500	George Wallace home	900	
Curatorial storage and		Frank Wallace home	1,100	
work space (off				
site)	5,600	Curatorial structure	5,600	
Curatorial and				
maintenance shop				
(on site)	500			
Visitor support				
shelter	400			
unisex restroom	150			
first-aid	75			
Total	9,925		9,600	-325*

*The available space figures do not include the basement in the Noland/Haukenberry and Wallace homes, and it is assumed that the space deficiency can be eliminated by using basement space for storage and possibly a workshop.

Table 2: General Development and Resource Protection Costs
(gross costs, 1985 dollars)

	<u>One-time Acquisition Cost</u>	<u>Annual Lease Cost</u>	<u>One-time Rehab/Constr Cost</u>	<u>Annual Operations and Maintenance</u>	<u>10-Year* Total</u>
On-site visitor services and operations	\$222,000		\$129,000	\$8,000	\$373,400**
Curatorial (off site)		\$50,000***			335,000
Interim on-site visitor services		<u>10,000</u>			<u>40,000**</u>
Facilities subtotal	\$222,000	\$60,000	\$129,000	\$8,000	\$748,400
Start-up of trust	<u>\$460,000</u>				<u>\$460,000</u>
Total	\$682,000	\$60,000	\$129,000	\$8,000	\$1,208,400

*Totals are life-cycle costs discounted at 8 percent annually to compare future year costs in present dollars.

**Assumes a maximum lease period of five years before acquisition of fee structures.

***This facility is costed for lease, rather than purchase, because it would most likely be outside the national historic site boundary.

Table 3: Staffing and Contract Services

<u>Current Staff</u>	<u>FTE</u>	<u>Annual Salary (1987 dollars)</u>
<u>Administration</u>		
superintendent (GS-12)	1.0	\$ 41,488
administrative officer (GS-07)	1.0	23,386
secretary (GS-05)	1.0	16,660
<u>Interpretation/protection</u>		
chief ranger (GS-09)	1.0	28,610
lead park ranger (GS-07)	1.0	23,386
park ranger (GS-05)	1.0	16,660
seasonal park ranger (GS-04)	3.7	49,018
<u>Curatorial</u>		
curator (GS-09)	1.0	28,610
museum aid (GS-04)	1.0	14,891
seasonal aid (GS-01)	0.3	2,886
<u>Maintenance</u>		
facility manager (GS-07)	1.0	23,386
Subtotal	13.0	\$268,981
<u>Additional Positions</u>		
<u>Interpretation/Protection*</u>		
park rangers (5 part-time GS-05 positions)	1.3	\$ 19,289
<u>Maintenance**</u>		
maintenance worker (WG-08)	1.0	25,688
Subtotal	2.3	\$ 44,977
<u>Contract Services</u>		
Cultural Resource Management (for five years)		\$ 20,000
Maintenance		16,000
Subtotal		\$ 36,000
Total		\$349,858

Note: Salaries are calculated for step 1 in grades 1-5 and step 5 for grades 7-12. They include 12.4 percent for personal benefits for permanent employees.

*The required staffing assumes that all the neighborhood walking tours are conducted by NPS personnel. If volunteers conducted some tours, the staffing requirements would be less. This staffing chart does not include the additional positions that would be required to expand the capacity of the home tour if warranted in the future.

**The need for additional maintenance staffing may be less. Depending on the ultimate workload of the existing maintenance staff and the scope of the contracted services, this position may be eliminated or filled on a seasonal basis.

APPENDIX A: LEGISLATION

PUBLIC LAW 98-32—MAY 23, 1983

97 STAT. 193

Public Law 98-32
98th Congress

An Act

To establish the Harry S Truman National Historic Site in the State of Missouri, and for other purposes.

May 23, 1983
[S. 287]

Be it enacted by the Senate and House of Representatives of the United States of America in Congress assembled, That, in order to preserve and interpret for the inspiration and benefit of present and future generations the former home of Harry S Truman, thirty-third President of the United States, the Secretary of the Interior (hereinafter referred to as the "Secretary") is authorized to acquire by donation, purchase with donated or appropriated funds, transfer from another Federal agency, or otherwise, the residence and real property known as 219 North Delaware Street in the city of Independence, Missouri, as passed to Bess Wallace Truman upon the death of her husband. The Secretary may also acquire, by any of the above means, fixtures, and personal property for use in connection with the residence.

Harry S Truman
National
Historic Site,
establishment.

SEC. 2. The property acquired pursuant to subsection (a) is designated as the Harry S Truman National Historic Site and shall be administered by the Secretary in accordance with the provisions of law generally applicable to units of the national park system, including the Act entitled "An Act to establish a National Park Service, and for other purposes", approved August 25, 1916 (39 Stat. 535; 16 U.S.C. 1-4), and the Act of August 21, 1935 (49 Stat. 666; 16 U.S.C. 461-467). The Secretary is further authorized, in the administration of the site, to make available certain portions thereof for the use of Margaret Truman Daniel subject to reasonable terms and conditions which he may impose.

16 USC 461 note.

SEC. 3. There is authorized to be appropriated such sums as may be necessary to carry out the provisions of this Act.

Appropriation
authorization.

Approved May 23, 1983.

LEGISLATIVE HISTORY—S. 287:

CONGRESSIONAL RECORD, Vol. 129 (1983):
May 6, considered and passed Senate.
May 10, considered and passed House.

APPENDIX B: MANAGEMENT OBJECTIVES

RESOURCE MANAGEMENT

*Preserve and protect the cultural resources of the Truman home, its contents, and its setting.

Maintain historic structures to preserve their integrity and physical fabric.

Maintain a level of structural stability sufficient to withstand planned visitor and administrative uses.

Maintain the structure, grounds, and furnishings to accurately represent the relatively static period following the presidency when President and Mrs. Truman (and later Mrs. Truman) occupied the home year-round.

*Participate in protecting the historic and architectural integrity of the Harry S. Truman National Historic Landmark District and coincident parts of the Harry S. Truman Heritage District.

VISITOR USE AND INTERPRETATION

Open the national historic site and interpret it to the public.

*Make the site and home available for visitor use in a manner that protects the historic structures and the furnishings and objects within and protects the values of the national historic landmark and city heritage districts.

Provide site access and interpretation to handicapped and other special populations without substantially impacting historic resources.

COOPERATION

Cooperate with all interested and affected agencies, groups, individuals, and jurisdictions to further the purposes of the historic site.

Develop and maintain a sound cooperative working relationship with Margaret Truman Daniel regarding the operation of the historic site.

Work closely with the Director of the Harry S. Truman Library on matters of mutual interest. Develop a means of enhancing and complementing the visitor's experience at the Harry S. Truman Library.

*Denotes a proposed addition or change in wording from the management objectives in the currently approved "Statement for Management."

Actively participate in community affairs on planning to ensure that the operation of the site is supportive of the needs of the community of which it is a part.

ADMINISTRATION

Ensure that the site is administered according to current policies and legislative mandate.

Provide adequate resources in the form of staff, equipment, facilities, and contracted services to protect site resources and make them available to the public.

Protect visitors and employees in accordance with applicable health and safety codes and standard law enforcement practices.

Administer the site in a cost-effective manner by making use where appropriate of volunteerism, revenue enhancement, private sector support, contracted services, concessions, and productivity enrichment techniques.

APPENDIX C: PRESERVATION TOOLS

The following is a list of available funding and assistance sources that could be applicable to historic preservation within the Truman neighborhood. The list is not comprehensive. It is intended to describe the most prevalent tools in use today and to show the wide range of preservation problems they address.

FUNDING SOURCES

The historic preservation grants-in-aid program, established by the 1966 Historic Preservation Act, provides 50 percent matching grant money each year to states to acquire, protect, stabilize, preserve, rehabilitate, restore, or reconstruct properties individually listed in the National Register of Historic Places or included within districts listed in the register. The program is administered in each state by the state historic preservation officer. Federal money distributed through this program reached a high in 1979, when \$55 million was appropriated, approximately \$30 million of which went directly to acquisition and development. In contrast, only \$25 million was appropriated in 1985, and none of that amount was for acquisition and development. Grants are also made available to the National Trust for Historic Preservation for its national preservation loan fund.

The Missouri revolving fund, established by a 1979 state statute (253.404 RSM) is administered by the Missouri Department of Natural Resources to acquire, preserve, restore, maintain, and operate historic properties. Properties can be acquired in fee simple title or any lesser interest through gift, grant, lease, or purchase, but not through condemnation. The fund was initially established with \$1 million from the state's general fund. In 1985, the fund totaled \$100,000.

Community development block grants, administered by the Department of Housing and Urban Development, provide federal funds to cities and communities for projects that will improve urban living conditions through housing and environmental change. Projects that are funded by this grant must benefit low- or moderate-income persons, aid in the prevention or elimination of slums and blight, or meet urgent community needs. Total funding for CDBG's is decreasing, and as local revenue sharing decreases, more community projects are competing for this source of funding nationwide.

Urban development action grants, also administered by the Department of Housing and Urban Development, provide funds to cities that demonstrate financial need and a firm financial commitment to specific private commercial and mixed use real estate development projects. Many historic redevelopment projects across the nation have taken advantage of UDAG monies. The availability of these funds is decreasing, however, and preference is given to cities with depressed economic conditions and little private capital available.

Title I home improvement loans and historic preservation loans, administered by the Department of Housing and Urban Development, are FHA insured loans to finance major and minor improvements to residential properties, including weatherization, alterations, and repairs. For single-family structures, loans may be up to \$15,000 and for apartment buildings the maximum is \$37,500. Historic preservation loans may be used to preserve, rehabilitate, or restore residential structures listed in or eligible for listing in the National Register of Historic Places. These programs provide an incentive for lenders to make loans they might not otherwise consider.

The endangered properties program, administered by the National Trust for Historic Preservation in the United States, is used for the emergency purchase of National Register buildings that are imminently threatened with demolition. Purchased properties are generally resold with easements or restrictive covenants attached to ensure their future preservation. Nonregister properties are also purchased in certain instances, for example to foreclose pending land use changes that could destroy the integrity of historic properties or districts.

The national preservation loan fund, also administered by the National Trust, provides low interest loans averaging between \$25,000 and \$50,000 with a minimum dollar-for-dollar required match. The fund may be used to establish or expand a revolving fund for the preservation of historic properties through acquisition and resale or through relending of funds for restoration and rehabilitation projects. The fund may also be used directly for the acquisition and restoration of buildings for reuse by the applicant or for the purchase of options to acquire historic properties. Eligible applicants include incorporated nonprofit tax exempt organizations and public agencies. The trust encourages flexible and creative use of the fund and it requires that recipients arrange for easements or restrictive covenants on properties to ensure their future preservation.

The preservation services fund, administered by the National Trust, provides matching grants up to \$5,000 for increasing the flow of information and ideas in the field of preservation. The grants help stimulate public discussion, enable local groups to gain technical expertise, and assist inexperienced groups in gaining confidence and credibility in fund raising. Other eligible uses of these grants include hiring consultants to undertake preservation planning and design, sponsoring preservation conferences, and obtaining professional advice to strengthen management capabilities.

The critical issues fund, administered by the National Trust, provides matching grants between \$5,000 and \$50,000 to help local, state, and national preservation and similar organizations to

- help preservation advocates become effective partners in local decisions that effect historic properties

- open channels of communication between groups, agencies, institutions, and individuals who can assist in efforts to preserve historic resources

improve the quality of development projects that result from cooperative planning

educate local leaders about the value of preservation as their communities face economic, social, and demographic change

Funding for the Critical Issues Fund is provided by a \$500,000 matching grant appropriated by Congress from the Historic Preservation Fund administered by the Department of the Interior. The primary uses of the fund will continue to be conflict mediation, partnership building, and identification and resolution of issues before they become more controversial.

The inner city ventures fund, administered by the National Trust, provides combinations of grants and low interest loans in equal amounts to community organizations. The purpose of the fund is to assist low- and moderate-income residents, especially minorities, in rehabilitation projects. In general, eligible projects improve housing conditions or alleviate the displacement of tenants from upgraded rental housing. Awards of between \$40,000 and \$100,000 are granted to community-based organizations working within distinct geographic neighborhoods that demonstrate significant involvement by neighborhood residents, demonstrate an ability to manage rehabilitation projects, and are incorporated, nonprofit organizations.

A revolving fund is a pool of money made available to finance renovation or preservation projects that conventional financing sources will not (or cannot) assist. The source of the pool for a revolving fund may be entirely public funds, entirely private funds (such as the National Trust's National Preservation Loan Fund) or a combination thereof. Cities may use community development block grant funds to establish a loan pool or may issue municipal bonds to establish one. A revolving fund is likely to be the major tool used by a community economic development corporation. Some revolving funds acquire historic properties for rehabilitation and resale with protective restrictions. Revolving funds may also be used to lend money for renovation and rehabilitation. Revolving funds may be set up for both commercial and residential properties.

Indirect sources of financial support include the technical assistance program administered by the National Park Service. Section 2 of the Historic Sites Act authorizes the National Park Service to establish technical advisory committees to aid in the restoration or reconstruction of historic structures. The National Park Service offers the services of its qualified professional historians, architects, and engineers. While a technical assistance program cannot meet all historic preservation needs, it can help property owners defray the costs of rehabilitation and can strengthen the use of other preservation tools.

Another indirect source of financial support is tax incentives. The Economic Recovery Tax Act of 1981 provides income tax credits as incentives for the reuse of certified historic structures. For persons

rehabilitating properties for commercial enterprises or rental housing, an investment tax credit, accelerated depreciation schedule, and accelerated amortization schedule are available. Projects must be certified by the National Park Service as being historically significant, and all rehabilitation work must meet the secretary of the interior's "Standards for Rehabilitation." Owners of properties listed on the National Register of Historic Places, either individually or within districts, are eligible.

METHODS OF PROTECTION

Preservation Easements

Preservation (or facade) easements, while relatively new, are increasingly used for the preservation of historic properties. Fee acquisition, used at times for preservation efforts, requires substantial sums for the purchase and maintenance of properties and removes the structure from local housing stock and property tax roles. Easements are generally far less costly: They require only a fraction of the market value to acquire, and they leave the cost of maintenance with the owner. Also, the properties retain their productivity as residences and taxable properties, which benefits the community.

Easements vary in nature, depending on the requirements to be fulfilled. Some of the easements that serve a conservation or protection function provide benefits to an adjacent landowner and are termed easements appurtenant. This term applies to easements that restrict building heights to protect solar access, retain rights of access to adjacent property, or protect visual integrity. Many historic preservation easements, however, do not provide benefits to adjacent property holders. Rather, they protect broad values that benefit the general public. Such preservation easements, which are granted to government agencies or nonprofit organizations that do not own adjoining land, are termed easements in gross.

The right or privilege granted by an easement may be made perpetual and may be drafted so as not to expire with the termination of the original landowner's interest in the burdened property. Such easements are said to "run with the land," that is, each successive landowner takes the property subject to the continued privilege of use by others who are benefited by the easement.

Preservation easements are commonly restrictive in that they limit or prevent specific actions from being taken in the future. Controlled actions might include changes to a building exterior or grounds or a structural addition. In other cases an easement may be affirmative in that it stipulates a future action to be taken, such as specific maintenance treatments and schedules. Restrictive provisions and affirmative obligations may be written into the same easement. Restrictions are generally more easily enforced than affirmative obligations, from the point of view that it is easier to prevent someone from doing something and easier to monitor a change in a property than it

is to require a change, particularly if the change would necessitate an expenditure on the part of the property owner.

Monitoring and enforcement of an easement are the obligations of the grantee and are essential to the continued validity of the easement. Initial documentation of the property's condition is necessary at the origination of the easement, and periodic inspections are required to document future conditions relative to the specifications of the easement. This obligates the grantee to certain periodic costs. The easement should specify the rights of the grantee to ascertain that the terms of the easement are being met and, if not, to seek injunctive relief or restraint through the courts.

Tax benefits are available for the donation of all or part of the value of an easement that is granted for conservation purposes. The grantor is eligible to receive tax incentives under section 170(f)(3)(c) of the Internal Revenue Code, which defines the term "conservation purposes" to include

- the preservation of land areas for public outdoor recreation or education or scenic enjoyment

- the preservation of historically important land areas or structures

- the protection of natural environmental systems

The government and nonprofit charitable organizations are eligible recipients of donated interest in land under section 501(c)(3) of the Internal Revenue Code. Donors of easements qualify for federal income tax benefits only if the recipient organization meets the criteria of section 501(c)(3) and if the easement is granted in perpetuity.

In the state of Missouri, no comprehensive legislation has been established to guide the creation, transfer, and enforcement of less-than-fee interests for preservation purposes.

Cooperative Agreements

The federal government is authorized under the 1935 Historic Sites Act to "contract or make cooperative agreements with States, municipal subdivisions, corporations, associations, or individuals with proper bond where deemed advisable, to protect, preserve, maintain or operate an historic or archeological building, site, object, or property used in connection therewith for public use, regardless as to whether the title thereto is in the United States." Cooperative agreements are resolutions between two or more parties for giving and receiving assistance. Assistance can take the form of financial, technical, product, or access agreements. However, obligations of the general fund of the Treasury cannot be made unless Congress has appropriated money. Agreements between landowners and interested parties may range from informal agreements to detailed contracts (U.S. Department of the Interior 1982).

Cooperative agreements provide the government no perpetual ownership interest in the property. Their primary drawback is that they generally lack the stringency of contracts and may be broken with a specific notice period (typically 60 to 90 days). They usually lack the assurance of permanent protection provided by acquisition of an interest in land. Cooperative agreements, however, can be written as legally binding contracts (U.S. Department of the Interior 1982).

Local Development Restrictions: City of Independence Ordinance 7917

City Ordinance 7917 recognizes the importance of preserving the historical and architectural character of the Harry S. Truman Heritage District and establishes standards by which the Heritage Commission will evaluate all proposed changes to properties within the district.

The ordinance defines the character and the extent of change that is allowable in the district. All proposed changes are evaluated for their compatibility with the most significant structures in the district and restricted within specific guidelines set forth in the ordinance. These guidelines and standards prescribe minimum setbacks of buildings from their lot lines, define the maximum percentage of a lot that can be paved, and prevent the use of front yards as paved parking lots. Landscape elements are restricted, and suitable plant materials are recommended. Structures are limited in height and lot coverage to perpetuate the scale and mass of two-story residential buildings.

Under the terms of the ordinance, the commission can be extremely restrictive of changes in color, building fabric (for example, the use of various types of siding), or other elements of the structures or grounds.

The purpose of the heritage district is

to maintain the area in the same manner as it is presently constituted as a turn-of-the-century midwestern residential community of spacious, free-standing homes and residentially related institutions situated in open yards and landscaped as presently constituted with future landscaping to be in accordance with other provisions of this ordinance.

Because architecture of the District is differing and represents an extended time span, it is not the intent of this Ordinance to insure conformity with a particular architectural style, but instead shall be to insure a harmony and appropriateness of maintenance and construction with the general character of significant structures within the District.

Following are the major restrictive elements of the standards.

Preservation of Existing Structures. Prior to demolition or reconstruction of any existing structures the Heritage Commission classifies the structure as belonging to one of four groups and approves demolition or reconstruction according to the following guidelines:

Group 1 structures are outstanding examples of particular styles or periods, works of major architects, or structures or groups of structures of exceptional visual quality. Group 1 structures must be retained in their historic characters in perpetuity.

Group 2 structures are of lesser historical, cultural, and aesthetic importance than those in group 1, but they are still of importance to the visual character of the area and should be retained in their historic characters and should be altered or replaced only if there is no alternative.

Group 3 structures are of little individual significance, but they contribute to the overall character of the area and reinforce the visual quality of the more important structures. Class 3 structures should be retained if possible, but they could be changed or altered.

Group 4 structures have no particular architectural value and are considered expendable.

New, Expanded, or Remodeled Structures. The following standards regulate new construction in the district:

Primary residential structures shall front upon publicly dedicated streets.

Front yards shall not be less than 25 feet or more than 40 feet in depth.

Interior side yards shall not be less than 7 feet in width.

Street side yards shall not be less than 25 feet in width.

Rear yards shall not be less than 30 feet in depth.

Any proposed construction is approved by the Heritage Commission only after it finds that the exterior visual appearance will be harmonious with the character of group 1 and group 2 structures along the block. Review by the Heritage Commission includes, but is not limited to, style, materials of construction, architectural detailing, proportion, bulk and dimensions, and placement on the property.

Outdoor Space. The following standards regulate changes in outdoor space:

Front yards shall not be paved or used for vehicular use or parking, except that drives to garages or other parking areas not located in front yards shall be permitted.

Trees having trunk diameters of 5 inches at 4½ feet or more shall not be removed except upon replacement by a tree of the minimum size and of a species listed in the Landscaping Attachment.

At the time of construction of any new primary structures, yard trees shall be planted, and they shall be planted as specified in the Landscaping Attachment according to species.

Street tree species shall be selected from and shall be at least the minimum size specified in the Landscaping Attachment. Street trees shall be spaced at minimum intervals according to species as listed in the Landscaping Attachment.

Total hard-surfaced area of any lot shall not exceed one-third of the total lot area.

Opaque fencing shall not be placed in any front yard.

Fencing in any front yard shall not exceed a height of 4½ feet and shall not be closer than 5 feet to any right-of-way line.

No advertising signs shall be placed in front yards.

Exterior private lighting shall not be mounted at an elevation of more than 7 feet above grade and shall not be closer than 10 feet to any side or rear property line.

Municipal, public, and private utility installations, including streetlight wiring, shall be placed underground in accord with standards established by the City Council.

Major landscape features, including trees and other vegetation deemed by the Heritage Commission to be important to the character of the district, shall not be removed or altered except with prior approval of the commission.

Proportion of Structure to Ground Area. The following standards regulate the scale and mass of the neighborhood:

Primary structures shall not be more than 40 feet and not less than 25 feet in height.

Lot coverage by primary structures shall not differ by more than 1 percent from a ratio of structure to lot of 1:5.

Restrictive Covenants: Truman Neighborhood Homes Association

The Truman Neighborhood Homes Association has drafted a covenant that can be voluntarily attached to a property deed by the owner to legally and enforceably limit the change to that property in perpetuity. The primary objective of the covenant is to preserve structures as residences. The covenant prescribes a maximum percent of paved area allowable on a lot, restricts the use of lots for parking, and requires the exterior appearance of a property to be maintained in a good and sound state of repair. Furthermore, no exterior surface of any improvement on the property can be altered without the expressed written consent of 75 percent of the homeowners bound by the covenant.

APPENDIX D:

RESOLUTION BILL NO. 86-665

RESOLUTION NO. 2733

A RESOLUTION EXPRESSING THE APPRECIATION OF THE INDEPENDENCE CITY COUNCIL FOR THE UNITED STATES PARK SERVICE IN THEIR MANAGEMENT AND CARE OF THE TRUMAN HOME AND SUPPORTING PLANS FOR ACQUISITION OF AS MANY AS THREE NEIGHBORING HOMES, BUT OPPOSING ATTEMPTS FOR ADDITIONAL OWNERSHIPS OR RIGHT OF CONDEMNATION.

WHEREAS, Independence is the home of Harry S Truman, 33rd President of the United States; and,

WHEREAS, the City has actively been involved in efforts to preserve the rich historic heritage of our community; and,

WHEREAS, the City has established the Harry S Truman Heritage District in the vicinity of the home of the former President; and,

WHEREAS, this district is governed by the local Heritage Commission which is charged with enforcing a variety of local zoning and other regulations in order to preserve and protect the neighborhood; and,

WHEREAS, the United States Park Service has recently released a General Management Plan Environmental Assessment for the Harry S Truman National Historic Site presenting a variety of options for the future management of this site; and,

WHEREAS, the City of Independence wishes to continue its cooperative working relationship with the National Park Service in management of this national treasure; and,

WHEREAS, the City of Independence wishes to retain local control over our community for our residents; and,

WHEREAS, we believe former President Truman would not have wished to have excessive federal intervention in our community.

NOW, THEREFORE, BE IT RESOLVED BY THE COUNCIL OF THE CITY OF INDEPENDENCE, MISSOURI, AS FOLLOWS:

SECTION 1. That the City Council of Independence expresses its appreciation to the United States Park Service for their management and care of the Truman Home.

SECTION 2. That the City of Independence express its support for the aspects of the general management plan for the Harry S Truman National Historic Site which involves the purchase, by the federal government, of two to three homes in close proximity to the Truman Home which have a historic relationship to the former president provided the owners are willing sellers.

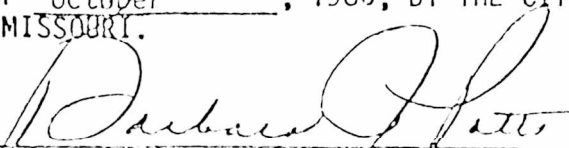
SECTION 3. That the City Council of Independence opposes any other direct ownership of additional property within this neighborhood by the federal government.

SECTION 4. That the City of Independence opposes the United States Park Service or any trusts or commissions established by the Park Service having the right of condemnation of private property and the right to purchase easements within the residential community surrounding the Truman Home.

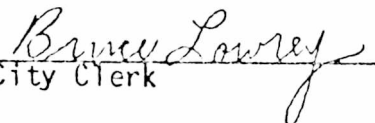
SECTION 5. That the City of Independence, through its City Council and Heritage Commission, pledges to work closely with the United States Park Service to insure that the area surrounding the former President's home continues to be maintained in an appropriate fashion.

SECTION 6. That the Legislative Committee of the Independence City Council is hereby directed to communicate these desires to the proper officials.

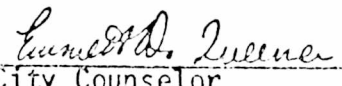
PASSED THIS 20th DAY OF October, 1986, BY THE CITY COUNCIL OF THE CITY OF INDEPENDENCE, MISSOURI.


Barbara J. Hatt
Presiding Officer of the City Council
of the City of Independence, Missouri

ATTEST:


Bruce Lowrey
City Clerk

APPROVED AS TO FORM ONLY:


for Kenneth D. Zuercher
City Counselor

REVIEWED BY:


for R. L. Auehla
City Manager

APPENDIX E: PUBLIC FUNDING ESTIMATE
FOR TRUMAN NEIGHBORHOOD TRUST

The estimate of public funding required for the Truman neighborhood trust is itemized in table E-1.

Table E-1: Public Funding Estimate for the Truman Neighborhood Trust

Operating Expenses

Salaries	
Executive director	\$ 30,000
Secretary	14,000
Overhead (60%)	<u>26,000</u>
Subtotal	\$ 70,000 x 3 years = \$210,000

Acquisition and Investment Fund

Three easements	\$ 50,000*	
Two fee title	<u>200,000*</u>	
Subtotal		<u>\$250,000</u>
Total		\$460,000

*Gross costs in 1985 dollars based on average neighborhood property values (see appendix F).

APPENDIX F: ESTIMATION OF RESIDENTIAL PROPERTY VALUES

All of the site protection alternatives considered in this document, with the exception of alternative 1, propose the expansion of the historic site boundary and acquisition of interest in additional historic district structures. A method was required for estimating the total cost of each alternative, including proposals for fee acquisition and preservation easement (less-than-fee) acquisition.

In May 1984 a National Park Service planner and a qualified National Park Service land appraiser devised a method of data collection and conducted an analysis of all properties in the national historic landmark district. The information that resulted is not intended to represent fair market value for any individual property. The prices, percentages, and factors were utilized to arrive at a gross cost estimate for the various project alternatives.

The basis for the cost estimates was an evaluation of district properties listed for sale and discussions with real estate brokers, appraisers, and individuals selling their own properties. Properties were not inspected but merely observed by driving by on public streets to determine their general physical characteristics.

Structures were classified by size and condition only. The size was based on the number of square feet of living area, as follows: small, up to 2,000; medium, 2,000 to 4,000; and large, in excess of 4,000. The inventory of sales data and discussions with real estate professionals suggested the following price ranges: small, \$30,000 to \$50,000; medium, \$50,000 to \$70,000; large \$70,000 to \$90,000.

The condition of each property was classified as good, fair, or poor, and properties in good condition were estimated at the high end of the price range while properties in poor condition were estimated at the low end. Other cost adjustments were also made, as follows: Properties on Maple Street, because of their nearness to downtown, are being utilized commercially or as multifamily structures. Informed sources indicated that these properties merit an additional price increment in the real estate market, so an additional \$10,000 to \$20,000 was added to the estimated costs of acquiring these structures. Conversely, the listing data and informed sources indicated that the properties in the immediate vicinity of Pleasant Street do not merit the full price, and it was recommended that these structures be estimated at a rate reduced by \$5,000 to \$10,000 per structure.

In other parts of the United States there is evidence that specific historical structures command prices in excess of the average in the neighborhood. It was therefore recommended that the Truman-related structures be increased in price somewhere between 5 percent and 15 percent over the previously recommended price range.

No specific information was obtained on which to base an estimated damage figure for the imposition of a facade easement on a structure. It was therefore necessary to rely on experience in appraising other types of real estate easements throughout the national park system. It was assumed that the easement would prohibit changing the external design, appearance, vegetation, and topography, so as not to destroy the historical integrity of the neighborhood. Based on this criteria the recommended purchase price for facade easements was in the range of 10 to 20 percent of the total property price.

To estimate land acquisition costs for legislative purposes, it was necessary to adjust the total price for all structures to account for a time lag for legislative action and the acquisition process. Also, administrative costs, the costs of payments in lieu of taxes, relocation costs, and contract costs were added. As a general rule, it was recommended that a factor range of 1.4 to 1.6 be utilized to account for additional costs on the Harry S Truman National Historic Site. If the proposed legislation called for opportunity purchase only, and the acquisition period was indefinite, the project adjustment factor would fall nearer the top of the factor range. In the event that condemnation was proposed, the project factor would also be near the top of the range.

APPENDIX G: CURATORIAL FACILITY REQUIREMENTS

The following spaces should adjoin and feature a security system, temperature and humidity controls, fire control, and floor drains and other flood controls.

Laboratory: 500 square feet containing

- sink with drainboards
- ventilation hood
- supplies and equipment storage
- worktable

Museum Records Workroom: 300 square feet containing

- worktable (catalog, accession)
- worktable (photography)
- desk (computer)
- file cabinets
- supplies and equipment storage

Research Area: 200 square feet containing

- worktable
- book shelves (reference books)
- file cabinets

Storage space: 4,600 square feet containing

- standard specimen cabinets
- double-wide specimen cabinets
- wardrobe cabinets
- map cabinets
- art storage racks
- steel shelving
- pallets for large objects (appliances)
- work tables
- desk
- file cabinets
- sink
- aisle space

Total: 5,600 square feet

PLANNING TEAM AND CONSULTANTS

NPS PLANNING TEAM

Allen Hagood, Project Manager, Denver Service Center
Norman Reigle, Superintendent, Harry S Truman National Historic Site
David Given, Midwest Regional Office, Omaha
John Hoesterey, Geographer/Socioeconomic Specialist, Denver Service Center
Gail Slemmer, Technical Writer-Editor, Denver Service Center
Mike Spratt, Transportation Planner, Denver Service Center
Berle Clemensen, Research Historian, Denver Service Center
Robert Holmes, Interpretive Specialist, Lincoln Home National Historic Site

CONSULTANTS

Margaret Truman Daniel
City of Independence Planning Department
 Bill Bullard, Director of Planning
 Pat O'Brien, City Historic Preservation Officer
 Larry Mlnarick, Zoning Administrator
Harry S. Truman Library and Museum
 Benedict K. Zobrist, Director
Jackson County Department of Parks and Recreation
Jackson County Historical Society
 Sally Schwenk
Missouri Office of the Attorney General
National Park Service
 Sharon A. Brown, Historian, Denver Service Center
 Paul Newman, Historical Architect, Denver Service Center
 Marvin Turner, Appraiser, Saint Croix National Scenic Riverway
 Ron Cockrell, Research Historian, Midwest Regional Office
 Ernest A. Connally, Washington Office
 Staff, Harry S Truman National Historic Site

As the nation's principal conservation agency, the Department of the Interior has basic responsibilities to protect and conserve our land and water, energy and minerals, fish and wildlife, parks and recreation areas, and to ensure the wise use of all these resources. The department also has major responsibility for American Indian reservation communities and for people who live in island territories under U.S. administration.

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