National Park Service
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Home, Park, and Shrine

Theodore Roosevelt's Sagamore Hill

Sagamore Hill National Historic Site

Adminstrative History

HOME, PARK, AND SHRINE

THEODORE ROOSEVELT'S SAGAMORE HILL

An Administrative History

by

Ned Kaufman

Prepared under cooperative agreement with

University of Virginia, Charlottesville

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SAGAMORE HILL NATIONAL HISTORIC SITE
Administrative History

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FOREWORD

Sagamore Hill National Historic Site in Oyster Bay, New York, was established in 1963 as a unit of the National Park system in order to preserve in public ownership a significant property associated with the life of Theodore Roosevelt. It consists of 83 acres located on Cove Neck peninsula in the town of Oyster Bay on the north shore of Long Island, about 45 miles east of New York City. The site had been the home of President Roosevelt and his family from the mid 1880s until his death in 1919. From 1902 to 1908, it served as the "Summer White House." After the death of the President's widow Edith in 1948, the Theodore Roosevelt Association purchased the property and operated it as an historic site, opening it to public visitation in 1953.

This study recounts the circumstances under which it entered the National Park Service (NPS), and what forces have shaped its evolution as a national historic site since then. It explores how NPS policies have interacted with private interests, larger historical forces, and the site's previous history to shape management decisions and park planning.

This study was undertaken in cooperation with the University of Virginia through its participation in the Cooperative Ecosystems Studies Units (CESU) Network. We would like to thank all those park and regional office staff who contributed to this study, with a note of special appreciation to former superintendents Vidal Martinez and Gay Vietzke, and to the park's Chief of Cultural Resources, Amy Verone.

Greg Marshall, Superintendent
Sagamore Hill National Historic Site
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PREFACE

An administrative history differs from a general history. A general history of Sagamore Hill would focus on Theodore Roosevelt's life there. This account shows how, much later, Sagamore Hill became a historic site, how it entered the care of the National Park Service, and what forces have shaped its evolution as a national historic site. It is intended to help the agency understand how it has managed the park so that it can manage it better, and perhaps more easily, in the future. It does so by revealing that certain apparently immutable factors have actually changed, and which could change again, while other factors that appear easy to change have in fact stoutly resisted it. It does so by showing how NPS policies have shaped the park, and by tracing how local politics, private interests, larger historical forces, and the site's previous history have shaped agency policies.

One thing that this administrative history is not is a general history of Sagamore Hill – a fascinating place whose intimate connection with Theodore Roosevelt has made it a place of pilgrimage and study for generations of visitors. Sagamore Hill was not merely a place where Roosevelt lived: it was shaped in intimate detail by Roosevelt, and so it is also a place where visitors can sense his vibrant personality. Sagamore Hill was more: as Roosevelt's summer White House, it was the site of many important events in American history. It is also a handsome Victorian house, designed by an important architect, with its original features and furnishings virtually intact. And it is a park that contains not only the vestiges of a late nineteenth-century gentleman's farm, but also woodlands and a beach. It is a remarkable place. But much of what makes it so forms the background, rather than the subject, of this study.

The research method employed in writing this history was grounded in a thorough review of documents held at the park, including the archives of the Theodore Roosevelt Association (TRA); at NPS regional and Washington offices; at the National Park Foundation; and in federal archives and record centers. It also included selective research in documents and secondary sources held elsewhere, including some provided by representatives of the TRA. Particularly pleasurable were the many visits to Sagamore Hill, frequent discussions with NPS staff and representatives of the National Park Foundation, and formal recorded interviews with current and former park staff and representatives of the association. (These interviews have been indexed and deposited at Sagamore Hill.)

The study's overall organization is chronological, taking the reader from Sagamore Hill's inclusion into the National Park system in 1963 to about the year 2000. Several themes stand out, and so are addressed either in separate chapters or in sections

of several chapters. They are also summarized in the Research Findings below. But the special emphasis given to two of these themes calls for explanation. One is the role of the Theodore Roosevelt Association, the park's donor, and a constant presence and influence at the park throughout the 40 years following the donation. The association is discussed at considerable length – not only because of its importance to almost every aspect of Sagamore Hill's history, but also because the persistence of disagreements between it and the National Park Service makes a careful presentation of fact and evidence essential. Second, the Theodore Roosevelt Birthplace in New York City is discussed at length, because a grasp of the issues leading to its donation to the NPS – as part of the same transaction that brought it Sagamore Hill – is vital to understanding the conditions surrounding Sagamore Hill's development. Moreover, the later history of the Birthplace has intersected that of Sagamore Hill at critical points.

BASIC FACTS AND FIGURES

Sagamore Hill National Historic Site (NHS) consists of 83 acres located on the Cove Neck peninsula in the town of Oyster Bay on the north shore of Long Island, about 45 miles east of New York City. It was Theodore Roosevelt's home from 1885 until his death in 1919, and from 1902 to 1908 was the "Summer White House." The park's structures include the Theodore Roosevelt Home, designed for Roosevelt by Lamb and Rich; Old Orchard, built for his son Theodore, Jr., in 1937; and various smaller farm or estate buildings and vestiges. The park itself includes lawns, forest, and a beach on Oyster Bay, reached by a mile-long nature trail. The park has extensive collections, including art, furnishings, guns, books, photographs, and archival materials. The park's offices are at Old Orchard, which also contains museum exhibits and audiovisual facilities. The park also has a small visitor contact station that includes a shop selling books and souvenirs. Visitation during the years 2001 through 2003 has ranged between about 41,500 and 46,500 annually. The annual budget for fiscal year 2004 is $979,000. The mission statement is as follows:

> It is the purpose of the National Park Service to preserve Sagamore Hill National Historic Site and protect the Theodore Roosevelt home and other associated resources where he and his family lived; and to interpret his life and significant accomplishment as the 26th President of the United States.

RESEARCH FINDINGS AND RECOMMENDATIONS

Findings

- **When acquired by the National Park Service, Sagamore Hill was already well established as a historic site: its management prior to 1963 shaped its future in significant ways.**

  Before donating Sagamore Hill to the National Park Service, the Theodore Roosevelt Association had managed the estate as a public park for a decade and had met the challenges of transforming it for public use, including strong local resistance and a need for large infrastructure investments. The association brought high professional standards to managing the estate, so that the National Park Service found the Theodore Roosevelt Home and its contents in good condition, and had to invest relatively little in start-up costs.

  At the same time, in inheriting the association's interventions, the Park Service would also perpetuate many of them, including some that it would probably have handled differently. Early assessments called for moving the association's parking lot and concession building, which intruded into the core of the historic landscape, yet this was never done. The association's historical interpretation proved almost equally durable. And the TRA itself, together with its sub-tenant, the Boone and Crockett Club, continued to use the park for meetings and events.

- **Early decisions about Sagamore Hill's shape and management, some taken against the recommendation of agency professionals, created long-term problems for the park.**

  "We live with the consequences of early planning decisions," remarks a regional official –sometimes for decades. During the acquisition process, senior NPS officials overrode the recommendations of professional staff in order to accede to the TRA's wishes regarding additions and deletions from the estate. These decisions created difficulties for park and agency managers that have persisted until the present, severely constricting options for historic landscape restoration. At the same time, association pressure to donate the Theodore Roosevelt Birthplace in New York led senior officials (again over the objections of professional staff) to accept a historic site of debatable authenticity. In overriding the recommendations of professional staff, NPS officials in the regional or Washington office were eager to smooth the way

towards donation of the park, while staff were thinking of the challenges of managing it afterwards.

- **The failure of the master planning process in 1963-64 created a vacuum whose repercussions were felt for more than three decades.**

  Although the park's *Master Plan* was essentially complete by the summer of 1963, key portions failed to win approval from the new NPS Director, George Hartzog. The absence of a fully approved plan would frequently be felt by park and agency staff, particularly where the landscape was concerned. Though the Park Service reconstructed the historic windmill, no action was taken on other recommended steps, including – most importantly – the removal of the parking lot and concession building, and the restoration of the original gardens. While the existence of a plan would not have ensured that the original landscape was restored, the lack of one compounded the problems created by decisions made during the acquisition process.

- **While providing some benefits, the park's close and ongoing relationship with the Theodore Roosevelt Association has also absorbed substantial energy from park and agency staff at all levels, created an imbalance in the public voices heard by the agency, and added significant difficulties to park management and planning.**

  The TRA has at times advocated with the press and elected officials on behalf of Sagamore Hill, helped the park to manage privately donated funds, and offered constructive criticism of park plans. However, it has also blocked initiatives both large and small, and has acted at times almost as a shadow administration. Its combination of private access to high government officials, control over money, and close involvement in policy decisions has ensured that agency officials at all levels are constantly alert to the association's wishes. In practical terms, the outcomes for the agency have ranged from policy determinations largely dominated by association priorities through bruising political battles over funding.

- **A particular focus of controversy has been the endowment donated by the Theodore Roosevelt Association in 1963 and earmarked by Congress for the benefit of Sagamore Hill and the Theodore Roosevelt Birthplace. In the early 1970s, the association began to assert control over the fund, and in succeeding**

decades it extended this control. From time to time, this led to serious conflict with the agency, but the association has consistently prevailed.

As documented in this study, none of the parties to the donation intended the TRA to wield this power. However, the NPS gradually assumed a posture of deference to the association, whose control over the endowment was strengthened in the course of other quarrels during the 1970s, and formalized in written agreements starting in 1984.

- **The quality and integrity of the Theodore Roosevelt Home and its collections have been key assets of the park, requiring relatively little intervention. Some of the Theodore Roosevelt's Home's systems, however, have been problematic.**

The park began to focus significant attention on the collections in the 1980s, spurred by a combination of external mandates, accumulated conservation needs, and increased expectations of historical accuracy in furnishings. A particular problem was the disputed ownership of some guns claimed by the Boone and Crockett Club, which had occupied space in the house since the Theodore Roosevelt Association stewardship. The most ambitious curatorial effort was a comprehensive furnishing plan carried out by Harpers Ferry Center (1985-91), which led to subtle but complete rearrangements throughout the house in 1993.

Architecturally, the house's systems have been most challenging. A heating system installed during the 1950s was found, by 1970, to be producing wintertime conditions of such extreme heat and dryness as to damage the architecture and furnishings. Repeated complaints, studies, and interventions have not succeeded in correcting the problem.

Lighting has created other challenges. During the 1980s and 1990s, the National Park Service tried to compromise between restoring the house's original lighting conditions and maintaining the brighter levels expected by modern visitors. The TRA campaigned for brighter lighting. The disagreement pointed to the absence of clear policies on historic lighting, or even of accepted standards for documenting and describing historical lighting conditions. The NPS position represented a pragmatic effort to accommodate at least three distinct points of view. The resulting conflicts have not been entirely resolved.

- **In contrast to its architecture and collections, the estate's landscape has posed intractable problems.**

By 1963, the National Park Service had formed a clear intent to restore Sagamore Hill's historic landscape. The *Master Plan* called for removing or relocating the TRA-era parking lot and concession building, restoring the gardens, and building a new visitor center outside the core of the estate. Other important goals included reconstructing the Stable and Lodge, and reopening original views.

The plan depended on the availability of suitable land outside the estate's core. However, by the end of 1963, the chance of acquiring such land had passed. Over the next two decades, the agency effectively abandoned the goal of landscape restoration. Though interest in the landscape began to revive during the 1980s, it was not until the next decade that a cultural landscape report (CLR) – prepared under the supervision of the region's newly created Olmsted Center for Landscape Preservation – comprehensively addressed the question once more. By then, landscape restoration was less in favor as a treatment, and though the CLR stressed the historical importance of the estate as a working farm, its proposals were less far-reaching than the 1963 plan. It accepted the intrusion of the existing parking lot and concession building (now rehabilitated as a visitor contact station), and had little to say about the restoration of the original gardens. Instead of reconstructing the Stable and Lodge, it proposed placing a new visitor center on the site, in a building closely similar to the original.

Unlike the *Master Plan*, the cultural landscape report did not undergo any formal process of agency review and approval. Therefore its conclusions and recommendations lack the stature of official policy, and while the report's preparation led to some activity, such as restoring original fences and removing nonhistoric trees, the long-term prospects for the landscape remain unclear.

- **Old Orchard House, while an asset to the park in many ways, has presented park managers with a building whose use and relationship to the park is problematic.**

Built by Theodore Roosevelt, Jr., in 1937, Old Orchard was acquired by the Theodore Roosevelt Association and joined to the park during the acquisition process in a process that did not allow for full consideration of its future role. Recognizing that a use would have to be found for the house, the 1963 *Master Plan* programmed it for offices and a museum, although the planners understood that its location within the park would limit its public usefulness. While the Roosevelt family and the TRA considered the building historically important, the NPS was ambivalent. In 1980 the agency documented it as a noncontributing building for purposes of the National Register of Historic Places, but this effort was later blocked by the New York State

Historic Preservation Officer. Meanwhile, the museum exhibitions – installed in 1966 – languished, becoming increasingly outdated and indeed embarrassing. Finally, in 1998, money was appropriated to replace them, and a panel of historians was convened to advise on the new exhibits. At the last minute, the funding was cancelled, and new exhibits were not opened to the public until 2004.

- **A new policy limiting visitation to the Theodore Roosevelt Home to guided tours had far-reaching ramifications on how the park was managed and experienced.**

By denying access to the house to some visitors, the 1993 policy increased the park's need to offer other attractions, principally a managed and interpreted landscape, and renewed exhibits at Old Orchard Museum. It also increased the need for trained interpretive staff or volunteers. In the context of severely limited budgets, this led to the shifting of some staff positions from maintenance. Park management launched efforts to recruit volunteers, while curatorial and interpretive staff also assumed the additional burdens of training and organizing them. The new policy also required rehabilitation of the old concession building as a visitor contact station, so that ticket sales could be moved out of the house. This change committed the Park Service to maintaining a building that had long ago been identified as a major obstacle to landscape restoration. A seemingly minor policy change had ramifications that rippled throughout the park.

- **The historical interpretation presented by the park has changed only slowly from the reverential attitude to the great man and his family adopted by the Theodore Roosevelt Association.**

While it was not at all uncommon for presidential houses to depict their former occupants in a reverential light, the Theodore Roosevelt Association gave Sagamore Hill's interpretation a particular character, which the National Park Service perpetuated. The association presented Sagamore Hill as a shrine not only to a great man, but also to his family, and indeed to an ideal of family life. The NPS institutionalized this approach in the new exhibits at Old Orchard Museum, in collections policies, and in published guides. It was not seriously challenged until after 1998, when the exhibits at Old Orchard were redesigned. The new exhibits sharply diminished the attention given to Roosevelt's family and personal life, and placed increased emphasis on the major public issues of his career. They also attempted to present these issues with greater attention to historical context. They did not, however, fundamentally challenge the underlying interpretation of historical events as the achievements of a great man.

- **Years of scarce federal funding have strained park managers.**

  Stagnant budgets and inadequate public funding became a recurring theme at Sagamore Hill in the early 1980s. Though park managers often responded creatively to the challenge, repeated budget pinches at the park and throughout the agency created a climate of scarcity that affected park operations at many levels. Authorized positions went unfilled, maintenance workers scrounged for nuts and bolts, and visitors were confronted with obsolete and outmoded exhibitions and brochures long after professional staff had recognized the need to replace them. For example, new exhibits were not provided at Old Orchard Museum until 2004 – 21 years after the park's first funding request.

Recommendations

Three major challenges confront park managers at the opening of the twenty-first century:

1. To redefine the relationship with the Theodore Roosevelt Association. The TRA's control over endowment spending and its close involvement in park management are inconsistent with the park's authorizing legislation, with the original intent of both donor and recipient, and with effective park management. The park will benefit from acceptance of new roles that allow the association to offer expertise without inappropriately dominating public commentary, and which acknowledge the gift of Sagamore Hill while accepting the reality of public ownership and responsibility.

2. To determine the future of Sagamore Hill's landscape. The importance of the estate's historic landscape to the park's integrity and interpretation was recognized by the 1963 *Master Plan*. Yet as the difficulties involved in a full restoration increased, the National Park Service has moved towards a more flexible or pragmatic ideal of rehabilitation. The unsolved question of whether to move the parking lot and concession building – 1950s intrusions into the core of the historic estate – remains critically important not only to the shape of the landscape, but also to its interpretive potential.

3. To achieve the park's full potential for presenting a richly engaging historical interpretation. Recently installed exhibits at Old Orchard Museum correct a long-standing imbalance between private or family narratives and more public historical narratives. However, reluctance to present points of view critical of Theodore Roosevelt continues to constrain park interpretation, and the park has yet to confront the issues raised by new social history approaches to race, class, and gender. These issues have the

potential to reunite the public narratives of Roosevelt's political career with the private and family narratives of Sagamore Hill – relations with children, spouse, friends, neighbors, servants, and the land itself – in a new synthesis of compelling interest to modern visitors.

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CHAPTER ONE

PRELUDE AND ESTABLISHMENT

Christmas was only days away, and so was the end of the Eisenhower administration, when a letter landed on the desk of National Park Service Director Conrad Wirth. He must have recognized the sender's name: Oscar Straus was the treasurer of the American Smelting and Refining Corporation (Fig. 1). His family had owned Macy's department store since 1894. His father was Oscar S. Straus, Theodore Roosevelt's Secretary of Commerce and Labor: Wirth would have passed the impressive fountain dedicated to Straus's memory many times on his way to work.[1] But this was not the subject of Oscar Straus's letter. For some years he had served as president of the Theodore Roosevelt Association (TRA), and it was Roosevelt's memory that was on his mind. He wrote to ask Conrad Wirth whether the National Park Service (NPS) would consider accepting Sagamore Hill, the President's home and "summer White House" on Long Island, as a gift from the Association. The gift would include a second property, a reconstructed New York City townhouse where the President had been born, as well as a substantial portion of the Association's endowment, which on that day in 1960 was worth almost $1 million.[2]

So begins the first chapter of Sagamore Hill's history as a unit of the National Park system. But there was a preface. This chapter, which tells the story of how Sagamore Hill became a historic site, and how the National Park Service acquired it, is that preface. But it is much more than that, for the themes and characters it introduces reverberate through Sagamore Hill's history.

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[1] The Oscar S. Straus Memorial Fountain is located on 14th Street between Pennsylvania and Constitution Avenues, NW. Designed by architects Eggers and Higgins and sculptor Adolph Weinman, it was authorized by Congress in 1927, built in 1947, temporarily stored during construction of the Ronald Reagan Building, and rededicated in 1998.

[2] Letter, Oscar S. Straus to Conrad Wirth, December 6, 1960; NPS Library. The letter was forwarded with a covering note by Northeast Regional Director Ronald F. Lee.

Fig. 1. Oscar Straus's father, Roosevelt's Secretary of Commerce and Labor, is greeted by Mrs. Roosevelt. (Reprinted by permission from Hermann Hagedorn, *A Guide to Sagamore Hill*, p. 50.).

SAGAMORE HILL IN THEODORE ROOSEVELT'S TIME

Theodore Roosevelt built Sagamore Hill in 1884-85 (Fig. 2). He had known the area since boyhood, spending summers with his extended family in the vicinity, and in 1883 he hired the well-known architectural firm of Lamb and Rich to design a house. But before construction started, his wife died in childbirth, leaving Roosevelt with a baby daughter. What Roosevelt did next was surprising: he went ahead with construction but left for his cattle ranch in the Dakotas, leaving baby Alice in the care of his sister. Returning in 1885, he moved into the house and became secretly engaged to a childhood friend, Edith Kermit Carow. They soon married, and Sagamore Hill became the family home Roosevelt had meant it to be. From 1902 through 1908, while Roosevelt was president, it was also the Summer White House[3] – the first private house to serve in this capacity.

Roosevelt later said that he had strong views about Sagamore Hill's layout, but had left the outside entirely to Lamb and Rich. The result was a good example of the Shingle Style, with enough gables, porches, and bay windows to be interesting without being flashy or eccentric. Sagamore Hill commanded its hilltop site with an assurance that makes it seem bigger than it is, and this impression would have been stronger in Roosevelt's time. Then, its verandas commanded sweeping views of Oyster Bay Harbor, while its grounds contained all the accoutrements of a gentleman's estate: barn, stable, pig pen, flower and vegetable gardens, orchard, tennis court, and azebo. In any case, with more than 20 rooms (including 12 bedrooms, plus servants' rooms), Sagamore Hill was hardly a small house, and in 1905 it became larger still with the addition of a spacious ground-floor room designed by C. Grant LaFarge, son of the artist John LaFarge.

Roosevelt died in 1919. His widow Edith remained at Sagamore Hill until her death in 1948. There were minor changes. In 1938 Theodore Roosevelt's son Theodore Jr. built himself a comfortable Georgian mansion, called Old Orchard, nearby on the estate. Most of the apple trees in the orchard were cut down. Others were no longer maintained. The Stable and Lodge burned down. The trees around the estate's perimeter grew up. Parkways brought Oyster Bay within the limits of suburban growth. But the house itself didn't change much. "Even the 1887 coal stove and the lead sinks in

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[3] This brief synopsis is largely based on Lawrence B. Coryell, William R. Failor, and Charles E. Shedd, Jr., "Sagamore Hill and the Theodore Roosevelt Birthplace, New York: Area Investigation Report," n.d. [1961]; NARA -Philadelphia, Records of the NPS Northeast Field Office, General Correspondence 1952-66, Box 35. Also Hermann Hagedorn, *A Guide to Sagamore Hill: the Place, the People, the Life, the Meaning* (New York, NY: TRA, 1953).

the kitchen and pantry were intact" as late as 1961, wrote a friend who had known the place well during Theodore Roosevelt's time.[4]

SAGAMORE HILL BECOMES A SHRINE

Birth of the Roosevelt Memorial Association

Sagamore Hill opened to the public in 1953. But the transformation from home to shrine had begun in 1919. Within days of the former president's death, the Roosevelt Permanent Memorial National Committee met to plan a tribute "of a kind and a size commensurate with the memory of the man we honor."[5] They considered many proposals: to establish a national holiday, plant trees around the country, build a Roosevelt highway or a national cemetery in France, change the name of one of California's national parks, create urban parks for the poor, build statues, arches, a bronze lion, or some other monument, publish a magazine "to trumpet forth over the whole country, the doctrine of straight Americanism which Colonel Roosevelt so splendidly preached," underwrite scholarships, an agricultural endowment, or foundations for the conservation of wildlife or the teaching of Americanization, found community service clubs, hospitals, homes for children, or a Roosevelt Memorial Museum. Elihu Root, an old confidante and ally of Roosevelt, was among those who argued for preserving Sagamore Hill, "as Mount Vernon has been preserved, so that the people of the country might go to the familiar scenes of his life and come into intimate touch with the humanity of the man." Many responded with enthusiasm to the idea of preserving the house that Senator Frank B. Kellogg called Roosevelt's "world-renowned but humble home." But Gifford Pinchot, the great forester and one of Roosevelt's closest confidantes, had another proposal. Conceding that "making a Mount Vernon out of Sagamore Hill" was an excellent idea – that, indeed, Sagamore Hill "must come to be a place of national pilgrimage" – Pinchot nonetheless thought this was the wrong mission for the committee. Congress would take care of it. Congress would also erect a great memorial in Washington.

Instead, Pinchot urged the Committee to establish a foundation dedicated to what we would now call environmental conservation, and what Pinchot defined as the question of "the use of the earth for the greatest good of the greatest number for the longest time."

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[4] Bertha Rose, "Sagamore Hill, Theodore Roosevelt's Long Island Home," *Antiques*, Vol. 80, October 1961, p. 334.

[5] Roosevelt Permanent Memorial National Committee Minutes, March 24, 1919; in TRA Executive Committee Minutes.

Pinchot's foundation would "take up at the time when each question was paramount, the question of wild life, the question of farms, the question of forests, the question of rivers, of soils – the whole body of matters which at all times form the foundation of human welfare, and at different times come to be the critical questions which are being discussed." This line of thinking, argued Pinchot, constituted the "one great subject" that Roosevelt had founded, and it was one that "can never grow old." A monument of this kind would be "characteristic of the man, worthy of him, in breadth and dignity, and I think in usefulness," and it would have a "permanent influence on the country."

The committee did not adopt Pinchot's proposal. It did greet his speech with applause, and passed a resolution that covered almost every other option than Pinchot's: the committee would build a monument in Washington, develop a park in Oyster Bay (which might eventually include Sagamore Hill), and establish a society to promote Roosevelt's "policies and ideals."

The society – the Roosevelt Memorial Association (RMA) – was soon established and fortified with a Congressional charter. It became the vehicle for accomplishing the other goals. It built up an endowment fund "to promote the development and application of the policies and ideals of Theodore Roosevelt for the benefit of the American people."[6] It amassed a substantial collection of Roosevelt papers and memorabilia and donated much of it to Harvard, some to the Library of Congress. It sponsored essay contests, prizes, school programs, and publication projects. It developed the park in Oyster Bay. The monument in Washington proved to be a more intractable challenge: sited on an island in the Potomac River, it was not finished until 1967, long after many other commemorative sites had been completed, including Mount Rushmore (1933), the Roosevelt Memorial wing of New York's American Museum of Natural History (1936), and Theodore Roosevelt National Memorial Park in South Dakota (1947).

Meanwhile, a second group dedicated to Roosevelt's memory was hard at work. Founded immediately after Roosevelt's death, the Women's Roosevelt Memorial Association (WRMA) had a very specific goal: to acquire the house in which Theodore Roosevelt had been born and open it as a shrine and museum. This rather ordinary row house of the 1850s, on Manhattan's East 20th Street had been altered, and then largely demolished, before Roosevelt's death. But the identical house next door, built for Roosevelt's uncle, was more or less intact. The WMRA bought both pieces of property and hired well-known architect Theodate Pope Riddle to reconstruct the vanished

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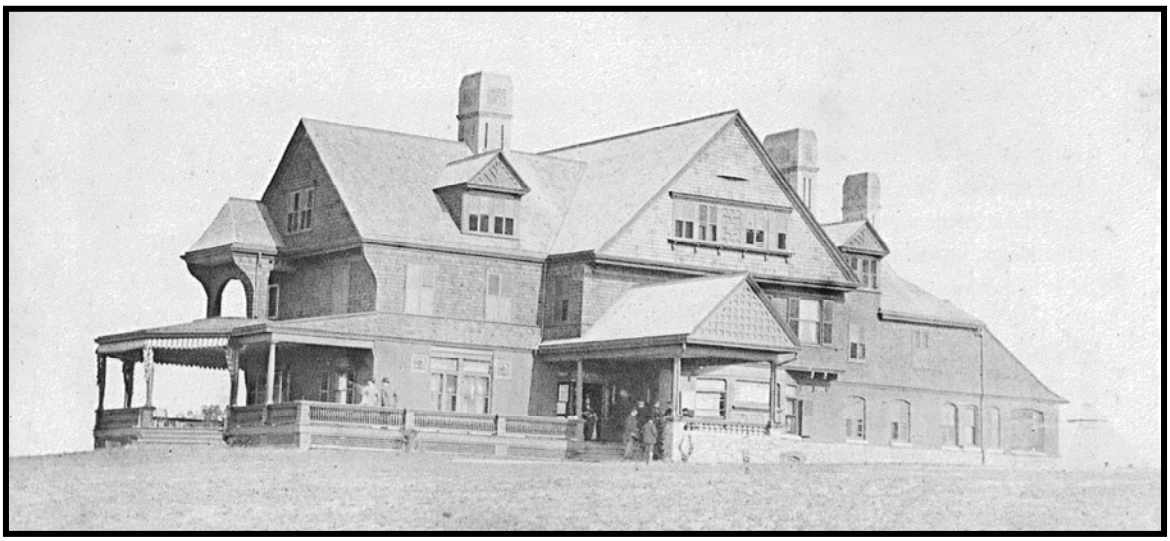
[6] *The Statutes at Large of the United States of America from May, 1919, to March, 1921*, Vol. XLI, Part 1, Washington, D.C., 1921, chap. 216, "An Act To Incorporate the Roosevelt Memorial Association [RMA]," sect. 3.



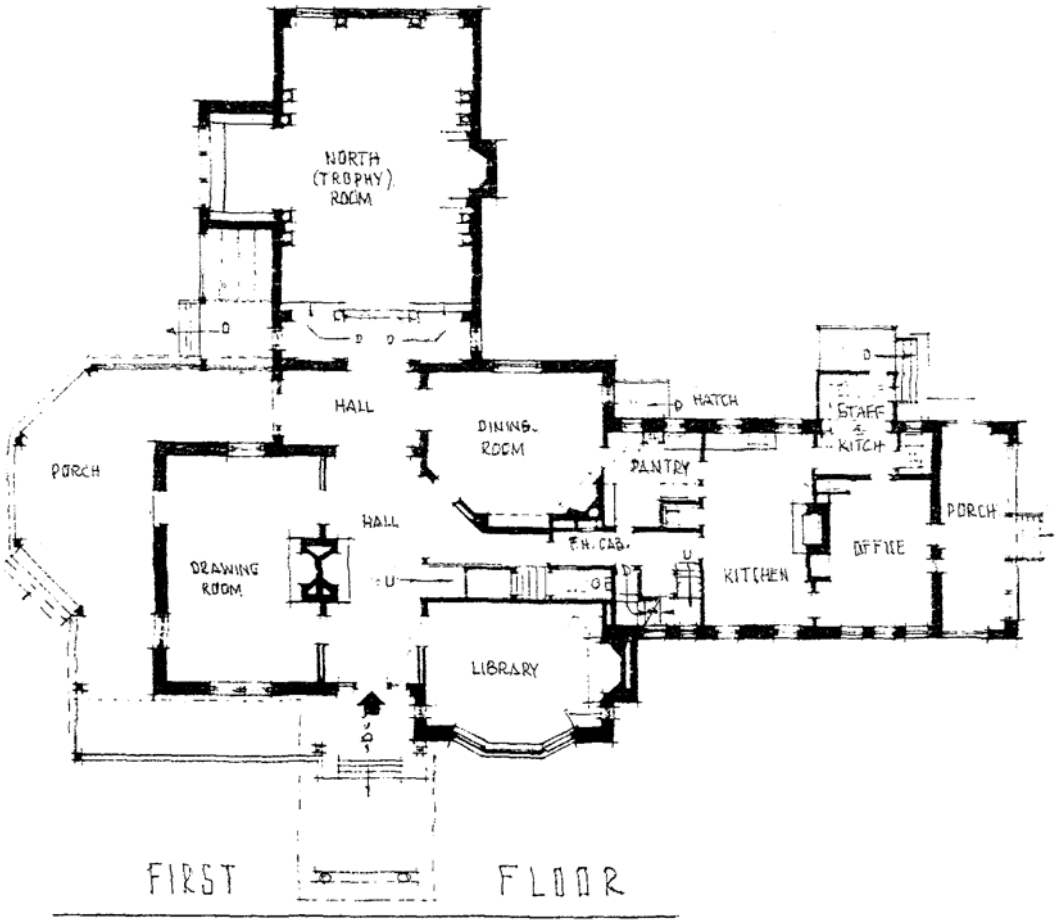


Fig. 2. Sagamore Hill: *top*, Theodore Roosevelt House, ca.1885; *above*, floor plan of first floor after addition of North or Trophy Room. (Courtesy Sagamore Hill NHS).

Roosevelt house and make a single building of the two. The entire assemblage, with memorial, museum, and offices for the WRMA, opened to the public in 1923 (Fig. 3).

From the beginning, the Roosevelt Memorial Association and the Women's Roosevelt Memorial Association worked closely together, and they soon agreed on a "plan of permanent cooperation"[7] under which the RMA would move its offices and collections into the Birthplace. The RMA donated $165,000 (or a little over one third of the total cost) towards the reconstruction, and in exchange, the WRMA granted the RMA a 999-year lease on the western half of the property.[8] By 1939, discussions of a formal merger were underway, and RMA Director Hermann Hagedorn could tell his trustees, "We are in spirit one organization and will become one in fact before long...."[9] It did not happen immediately, but by 1952 the two organizations were again negotiating, and two years later the Roosevelt Memorial Association – now renamed the Theodore Roosevelt Association – would merge with the women's organization and assume full responsibility for the Birthplace.[10]

Through all these years, the Roosevelt Memorial Association had never lost sight of Sagamore Hill, and in 1941 trustee James Garfield undertook to discuss with Roosevelt's widow the association's fear that the house might slip out of family hands. Her response was encouraging to the notion of a buyer who might be willing to preserve the house. The RMA itself, thought Garfield, was in no position to take it: perhaps the State of New York would do so. And, wondered the trustees, was there not a "very strong movement on foot in the Department of the Interior to acquire historic houses?" The purchase price could perhaps be raised, if there were someone willing to pay the costs of maintenance.[11]

Director Hagedorn thought the Roosevelt Memorial Association should buy Sagamore Hill, and to facilitate doing so, he now proposed shedding the Birthplace. This would allow the RMA to use its capital "judiciously in ways that will really advance the Association's aims." Hagedorn didn't propose doing all this right away: the two associations might continue to spend "income and capital" on the Birthplace for another

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[7] RMA Minutes, February 4, 1922.

[8] RMA Minutes, February 4, 1922. This records a decision to donate $150,000. "Area Investigation Report," p. 27, gives a contribution of $165,000 and a total cost of just under $440,000.

[9] RMA Executive Committee Minutes, January 6, 1938, January 12, 1939, May 10, 1940.

[10] RMA Executive Committee minutes, December 17, 1952 (request for financial aid), January 15 and June 15, 1954 (merger). The RMA's name change to the Theodore Roosevelt Association (TRA) was confirmed by act of Congress in 1953. Congress formally authorized the merger in Public Law 445, March 29, 1956.

[11] RMA Executive Committee Minutes, May 27, 1941.

10 years or so, but only on the basis of an arrangement to transfer it at the end of that time.[12] In the meantime, Hagedorn conferred with the spokesman for the Roosevelt estate, and reported to his board of directors that Mrs. Roosevelt and her children would be glad to sell the RMA the house and some land. Yet Hagedorn doubted the association's ability to take it. He went to see Secretary of the Interior Harold Ickes. A political associate of Roosevelt, Ickes would have known the house during its presidential days, and he had attended the Roosevelt Permanent Memorial National Association's initial meeting in 1919. Now, working for the New Deal president, he was credited with organizing cross-over support from Theodore Roosevelt Republicans.

Ickes told Hagedorn the government would not buy the house, but would "accept and maintain it if it were presented to the nation."[13] This was less discouraging than it might seem. Interior commonly conditioned acceptance of new park units on their donation: Saratoga National Historical Park, authorized in 1938, was one example. Moreover, this was essentially the solution proposed by Garfield, with the RMA responsible for the purchase price but relieved of maintenance obligations.

By the end of 1947, Mrs. Roosevelt was in precarious health, Ickes was out of government, and the Roosevelt family was looking to the RMA to purchase Sagamore Hill and ensure its future as a "permanent memorial." The trustees were now "favorably inclined" towards buying it, and even to maintaining it, on the model of the private associations that managed Jefferson's Monticello, Washington's Mount Vernon, and Lee's Stratford.[14] They launched active negotiations, and there was some urgency, since if agreement were not reached before Mrs. Roosevelt's death, the RMA would have to negotiate with 11 separate heirs. Meanwhile, the tables had turned: the Roosevelts were now insisting that the RMA take the entire estate, while the association was trying to keep the purchase price down without descending into crass bargaining.[15]

Edith Roosevelt died on September 30, 1948, and the Roosevelt Memorial Association's executive committee soon resolved to purchase the estate, house, and contents.[16] A contract was drawn up – with all 11 heirs – and a fundraising campaign set in motion. Still the association drew back. To run the house as a public site would require a zoning change. At the last moment the RMA proposed to condition the sale

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[12] Letter to James Garfield, June 12, 1941; recorded in RMA Executive Committee Minutes, September 19, 1941.

[13] RMA Executive Committee Minutes, September 19, 1941.

[14] RMA Executive Committee Minutes, December 23, 1947.

[15] RMA Executive Committee Minutes, March 16, 1948.

[16] RMA Executive Committee Minutes, March 16, 1949.

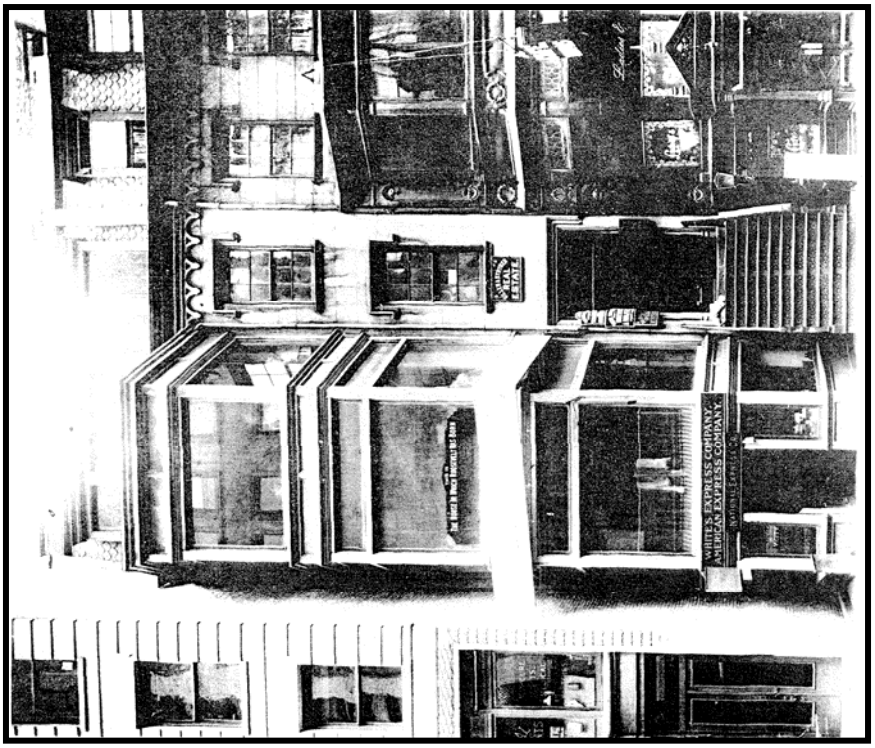

Fig. 3. The Theodore Roosevelt Birthplace in New York City, as it looked about 1900 (left) and in 1919 (right). (TRA Collection: courtesy Sagamore Hill NHS. (Reprinted from Coryell, Failor, and Scedd, "Sagamore Hill and the Theodore Roosevelt Birthplace: Area Investigation Report.").

on its ability to amend the zoning and raise funds. The heirs held firm: failing an agreement by December 1, 1949, they informed the association, they would feel free to "sell the property in the open market and dispose of the contents of the house."

The Roosevelt Memorial Association reached an agreement: $104,000 for the house and estate, $20,200 for the contents.[17] From a business point of view, this was a fair deal. Appraisers working independently for buyer and seller had appraised the real estate at about $140,000, not including the contents of the house. On the other hand, the appraised value represented the estate broken up and sold in parcels; as a single property, its value would have been "under $100,000."[18]

The RMA had been right to worry about the zoning change. The trustees of Cove Neck so adamantly opposed the intrusion of visitors that they threatened to fight the association "even up to the Supreme Court."[19] The main issue was the need to redesign the access road. The RMA was undeterred: its trustees were used to high-stakes politics. "When we find that we are at a dead end, we have to get around it," said the association's president.[20] Another trustee, Howard C. Smith, summed up Cove Neck's options: either "graciously granting a change of zoning or having it forced down their throats by higher authority." The RMA, he pointed out, was giving the Cove Neck authorities "the opportunity of bowing graciously to the inevitable."[21] In due course they did just that. But local opposition succeeded in delaying the house's opening for an entire year.[22]

Meanwhile the RMA pressed forward on other fronts, beginning as early as 1948 to address issues of fire protection, insurance, and visitor parking; to inspect the heating system; to repair the roof; to develop landscape and exhibit plans and a maintenance

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[17] For a one-year option, the RMA proposed to pay $10,000 plus the carrying charges on the house and the cost of necessary repairs, including painting and a new roof; RMA Executive Committee Minutes, March 16, October 18, November 29, December 19, 1949; February 7, April 19,1950. Elias A. Patterson, Appraisal of Property, April 3, 1948; SAHI Archives, TRA Records, Box 1, Folder 8. Agreement between Roosevelt estate heirs and Roosevelt Memorial Association to sell the property, May 11, 1949; SAHI Archives, TRA Records, Box 1, Folder 7. Indenture between Roosevelt estate heirs and Roosevelt Memorial Association, February 10, 1950; Nassau County Record Office, Deed 4128, pp. 88-105. Bill of Sale, February 22, 1950; SAHI Archives, TRA Records, Box 1, Folder 10.

[18] The two appraisal values were $139,305 and $140,000; RMA Executive Committee Minutes, April 26, 1948. For the value of the property as a single estate, see Elias E. Patterson, Appraisal of Property, April 3, 1948.

[19] RMA Executive Committee Minutes, January 2, 1951. For the zoning issue, and the closely related issue of the access road, see also, *int. al.*, TRA Executive Committee Minutes, July 19, 1948; November 29, 1949; July 18, October 27, 1950; and January 2, 1951.

[20] Quoted in RMA Executive Committee Minutes, July 18, 1950.

[21] Howard C. Smith, Memorandum "Re. Sagamore Hill," December 18, 1950; SAHI Archives, TRA Papers Box 9, Folder 1.

[22] RMA Executive Committee Minutes, October 27, 1950, and March 20, 1951.

budget; and, of course, to raise funds. Experts made site visits: A. E. Howland, chief engineer of the Long Island State Park Commission, to advise on essential landscape alterations; Hardinge Scholle of the Museum of the City of New York, to consider public access to and display of the interiors; and at least two delegations from the National Park Service.[23] The RMA began to consider what rooms to open to the public, and where to place exhibits of memorabilia.

Sagamore Hill opened to the public in the summer of 1953. That same year, the Roosevelt Memorial Association changed its name to the Theodore Roosevelt Association (TRA), with confirmation by an act of Congress. Acquiring the two sites triggered repercussions throughout the TRA's operations, in particular those concerning the Birthplace in New York. Running the Birthplace had proven to be expensive, and income from visitors disappointingly low. As early as 1941, RMA Director Hermann Hagedorn had understood the problem. Remarking that the association was spending both "income and capital" on the Birthplace, he proposed getting rid of it after an interval of 10 years – which would have ended in 1951 – so that the organization could concentrate on other aspects of its mission.[24] Now the acquisition of Sagamore Hill caused the trustees to reevaluate their commitment to the Birthplace. To Howard C. Smith, the issue was clear: Sagamore Hill was "better worth saving than Roosevelt House." The "only course" was to "endeavor to get rid of" the association's obligation to the Birthplace, which was costing it $6,000 per year.[25] Frederick Rath, director of the National Trust for Historic Preservation, carried out a painstaking analysis of Sagamore Hill's relationship to the association's programs and reached the same conclusion. He believed the Birthplace's prospects as a historic house museum were limited, and pointed out that continued capital outlays would soon render any discussion of future programs moot. If federal and state governments refused to take the house, Rath suggested the TRA rent or sell most of it. The "scale of the operation" could then be cut down to exhibiting the few rooms associated with Theodore Roosevelt. Rath's criticism of the Birthplace was balanced by his enthusiasm for Sagamore Hill. "It seems logical to me," he wrote, "to think that Sagamore Hill should become the point of greatest emphasis in

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[23] For the site visits, see RMA Executive Committee Minutes, June 1, 1948, and March 16, 1949. Also letter, Ronald F. Lee to Horace Albright, January 23, 1952; NPS Library. The letter makes clear that Albright, a former NPS director and now a RMA board member, had issued the invitation. The committee included Francis S. Ronalds (Superintendent, Morristown NHP), Harry Thompson (Associate Superintendent, National Capital Parks), Eric Gugler (American Scenic and Historic Preservation Society), and Ronald Lee; they met with Albright and TRA director Hermann Hagedorn.

[24] Letter to Garfield, June 12, 1941.

[25] Smith, Memorandum "Re. Sagamore Hill," December 18, 1950.

the Association's future program": its programs must be "sharpened and brought to bear upon Sagamore Hill."[26]

To Oscar Straus, Rath's advice seemed so important that he immediately distributed it to the entire executive committee.[27] It was not adopted – at least not the final and crucial recommendation. The financially desperate Women's Roosevelt Memorial Association did try to interest the NPS in taking the Birthplace, but when the attempt failed, the TRA rescued it through a merger in 1954. Now, commented Straus "the problems of Roosevelt House [i.e., the Birthplace] become a major problem of the Association."[28] The trustees still hoped to free themselves of it. They directed Hagedorn to confer with Horace Albright, a trustee and a former director of the National Park Service. If Albright thought it feasible, Hagedorn might then pursue the matter with the service's current director, Conrad Wirth.[29] But when all of this failed, the TRA did not sell the Birthplace. Hagedorn cast about for solutions to an increasingly dire situation: why not set up a "'New York in 1858 Shop'" in the house, he asked in 1954? It would get wide publicity and "might conceivably do a land office business" selling "women's hats in the style of the period, crinoline dresses for fancy dress parties, fashion plates, reprints of New York newspapers..., and knickknacks and other antiques...."[30] But the fact was, the TRA was now in just the position from which Rath and Smith and Hagedorn and Straus had tried to save it: burdened with two substantial pieces of real estate, one of which was of dubious historical value yet was steadily draining the association's coffers. And now, Sagamore Hill's fortunes were tied to those of the Birthplace.

SAGAMORE HILL BECOMES A UNIT OF THE NATIONAL PARK SYSTEM

The formal history of Sagamore Hill's entry into the National Park system began with Straus's letter on December 6, 1960. But the Theodore Roosevelt Association had already tested the waters, as any politically sophisticated group might be expected to do. Before the middle of September, Straus, Albright, and Bertha Rose had discussed the

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[26] F. L. Rath, Jr., "Report to the Theodore Roosevelt Association, Part II: The Relationship of Sagamore Hill to the Program of the Theodore Roosevelt Association," n.d. (but attached to a cover letter from Oscar Straus dated September 24, 1953); SAHI Archives, TRA Papers, Box 9, Folder 12.

[27] Memorandum, Straus to Executive Committee, September 24, 1953; SAHI Archives, TRA Papers, Box 9, Folder 12.

[28] Oscar S. Straus, "Theodore Roosevelt Association – Where Are We Going?" June 15, 1955; SAHI Archives, TRA Papers Box 9, Folder 5.

[29] TRA Executive Committee Minutes, January 15, 1954.

[30] TRA Executive Committee Minutes, October 4, 1954.

donation with Conrad Wirth, who was "deeply interested in the matter." There were more "informal talks."[31] Soon there were staff contacts as well. By October, Horace Albright, who was managing the association's campaign, had talked to Ronald Lee, who became the project's advocate within the NPS. In fact, at Albright's suggestion, Straus sent his December 6 letter to Lee, who then forwarded it to the NPS Director, added his own enthusiastic support, and scheduled a meeting to discuss it.[32] On the 22nd, Wirth sent his reply: He would be "very glad to sit down and discuss" the possibility of Sagamore Hill becoming part of the National Park system; the association's willingness to "set up a substantial endowment fund" was "most generous"; and he would instruct his staff to draft a bill for discussion.[33]

These dates raise an interesting question of timing. Less than a month later, John F. Kennedy would be president; a Republican would give way to a Democratic administration. The Theodore Roosevelt Association was quite aware of this. At the end of November, Albright warned the trustees that "it might be possible that the incoming administration would not look with favor upon this."[34] What caused the TRA to come forward at this juncture? Albright told Assistant Regional Director George Palmer that there was dissension within the association's board: angry at the Roosevelt family's interference with the Washington memorial, some members thought "now may be the time to transfer the assets" to the NPS. But, he explained, Sagamore Hill's future was "brought to a head" at just that moment by another development. The widow of Theodore Roosevelt, Jr., had died, and the estate was now being broken up. The furniture from Old Orchard was sold in mid-October, and by the 24th, the real estate – four acres lying near Sagamore's heart – was on the market. The fate of Old Orchard, as Albright pointed out, was an even more pressing question than that of Sagamore Hill.[35]

The Theodore Roosevelt Association was exploring the options for Old Orchard (Fig. 4). As Albright was talking to the National Park Service, Bertha Rose was evaluating Old Orchard's potential to enhance Sagamore Hill – without any reference to the Park have to sell 10 acres or so along the beach – say, for a conservation reserve – to fund the

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[31] TRA Executive Committee Minutes, September 14 and November 30, 1960. The minutes for January 9, 1961, record that Albright had had "many conversations with Mr. Wirth."

[32] Memoranda, Assistant Regional Director George A. Palmer to Lee, October 24, 1960; Lee to Wirth, December 9, 1960; and letter, Lee to Straus, December 9, 1960. NARA - Philadelphia, NPS Northeast Office Administrative Correspondence 1953-68, Folder: Sagamore Hill 10/53-8/61.

[33] Letter, Conrad Wirth to Oscar Straus, December 22, 1960; NPS Library.

[34] TRA Executive Committee Minutes, November 30, 1960.

[35] Memorandum, Palmer to Lee, October 24, 1960.

Service.[36] The trustees considered acquiring it. Perhaps, suggested one, the TRA would acquisition.[37] But there were other forces at work, for the fact was that Albright had not told his former colleagues at the NPS the whole truth. The cost of running two historic houses had thrown the association's finances into a downward spiral: sooner or later the TRA would face a crisis. Straus now believed it was time to wrap up the association: it could not go on financially, its membership was aging and not being replenished, its sense of purpose depended largely on the very properties that were bringing it down.[38] Straus saw the TRA headed towards financial collapse, and it may well be that this impending crisis was "brought to a head" by the prospect of having to acquire and manage a third house – and that this in turn precipitated the crisis over Sagamore Hill's future.

One way or another, internal events seem to have dictated the timing of the Theodore Roosevelt Association's offer. And perhaps the association's need for a speedy resolution prompted Wirth to start drafting legislation immediately. If so, the approach may have had a political benefit as well, since it promised to get things underway before the new Democratic administration was well settled. The process of acquiring and establishing the new historic site went smoothly. Once the parties had reached an initial agreement, neither side seems to have had much doubt that Congress, the Department of the Interior, and the White House would eventually approve the donation. Horace Albright predicted that the bill's passage would require two sessions, and that is exactly how long it took; President Kennedy signed it without delay; deeds, inventories, and agreements were produced more or less on schedule; and it did not rain on the day of the dedication. So smooth was the process that the transfer could conceivably have taken place even sooner than it did: the July 1963 date was chosen to coincide with the start of a new federal budget year.[39]

If the acquisition process was unremarkable (its major incidents are summarized in Appendix C), this very lack of incident calls for reflection. In 1961, Horace Albright warned the TRA trustees that "the Park Service is not anxious to take over properties

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[36] Memorandum, Mrs. Reginald P. Rose to Oscar Straus, October 24, 1960, and "Further suggested usages for Old Orchard," April 1961; NARA - Philadelphia, Box 6, NPS Northeast Office Administrative Correspondence 1953-68, Folder: Sagamore Hill 10/53-8/61.

[37] TRA Executive Committee minutes, September 14, 1960; see also November 30, 1960.

[38] John Gable, interview with the author, August 12, 2004. Gable's knowledge of what Straus thought is based on his recollection of conversations many years earlier.

[39] Memorandum of Meeting, prepared by Oscar Straus and forwarded to Ronald Lee, August 29, 1962; NARA -Philadelphia, Correspondence Files regarding Establishment of Park Service Sites at Sagamore Hill and Theodore Roosevelt's Birthplace (digital copy, NRBPA-79-413-ROOSEVELT (A), p. 18).

and has turned down twenty to every one accepted."[40] Yet Sagamore Hill went through, and went through quickly. What factors made it possible for the Theodore Roosevelt Association, the Department of the Interior, the Kennedy administration, and Congress to overcome these odds?

Fig. 4. Old Orchard, the house built on the Sagamore Hill estate by Theodore Roosevelt, Jr., in 1937. (Reprinted with permission from Hermann Hagedorn and Gary G. Roth, *Sagamore Hill: An Historical Guide*, p. 62.)

FACTORS FOR SUCCESS IN THE CAMPAIGN FOR SAGAMORE HILL

Horace Albright and the Theodore Roosevelt Association Trustees

Some sites enter the National Park system through protracted grass-roots campaigns. The Theodore Roosevelt Association had no need for such a campaign. It did not need to organize letter-writing drives, cultivate support among local businesses,

[40] TRA Executive Committee Minutes, January 9, 1961.

or petition its Congressmen. Not that it had no need for Congress: when the time came to present a bill to Congress, the association was more than gracious, meeting a group of visiting Congressmen with a delegation that included Roosevelt's daughter, Ethel, and the grandson of his Secretary of the Navy, Oscar Straus. The TRA's "kindness and hospitality" in bringing out these dignitaries did not go unnoticed.[41] But long before the issue ever went to Congress, the TRA had been able to reach right to the top of the NPS. That certainly saved time.

The Theodore Roosevelt Association's board was powerful and well connected. There was Oscar Straus. There was also Horace Albright (Fig. 5). Albright had come to work for the Park Service in 1916, just a few years after Roosevelt left office. A protégé of the service's founding director, Stephen Mather, he succeeded him as its second director, serving from 1929 until the fall of 1933; Conrad Wirth, the current director, had worked for him. After leaving the National Park Service, Albright had joined the RMA's executive committee. But he remained closely involved with the Park Service, serving from 1952 to 1958 on the Advisory Board on National Parks, Historic Sites, Buildings, and Monuments. As late as the 1960s he made annual inspection trips to Yellowstone, and he was not shy about sharing his opinions. "Albright," commented one NPS historian, "and indeed all retired employees, believe they retain the inalienable right to suggest ways of improving the operations of the National Park Service."[42]

Albright joined the RMA's Executive Committee in the fall of 1950,[43] just months after the association purchased Sagamore Hill, and his expertise and connections were soon put to use. In the fall of 1951, Albright brought a group of "former associates" to Sagamore Hill to study the house and guide the executive committee: they included the service's newly promoted Assistant Director, Ronald Lee, who submitted a detailed report on the group's recommendations.[44]

Commandeering NPS resources was one of Albright's roles. Another was explaining how the Park Service worked, and praising it to mistrustful colleagues. An occasion arose quite soon after his arrival on the board. At the end of 1950, facing steep local opposition to rezoning, Nassau County offered to circumvent the problem by accepting the deed to Sagamore Hill. One trustee opposed the idea because

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[41] Speech by Congressman Rutherford, House Debate on H.R. 8484, April 2, 1962.

[42] Russ Olsen, "Administrative History: Organizational Structures of the NPS, 1917 to 1985" (U.S. Department of the Interior [DOI], NPS: 1985), p. 17.

[43] RMA Executive Committee Minutes, October 27, 1950.

[44] Letter, Lee to Albright, January 23, 1952; NPS Library. The TRA's Sagamore Hill Committee had already summarized the visitors' recommendations in its own report to the trustees; TRA Executive Committee Minutes, December 18, 1951.

"government-owned and operated shrines were generally 'dead things,' material structures merely, without vitality or spirit...." Not necessarily so, said Albright, speaking "out of his own experience as chief of the National Park Service."[45]

As concerns about government ownership would surface again in 1961, it is worth reviewing them. One was that government would place a dead hand upon a living place. This presumably reflected both a general idea about government and a specific dedication to the association's founding ideal of a vital institution. The worry returned early in 1961. This time, Roosevelt's daughter Ethel rose to the service's defense: having seen the "wonderful job" it had done at Medora (Roosevelt National Memorial Park) with its "dedicated men and women who have a deep devotion to their work," she put the NPS in a "special place among federal agencies." Director Hagedorn said much the same thing: that it was "very different from most Federal groups; that the people connected with it are dedicated to their work; it was exhilarating to be with them."[46]

A key concern in 1961 was how much input the Theodore Roosevelt Association would have, were Sagamore Hill to be given to the federal government. Albright addressed this at some length – and at Straus's particular request. At many NPS units, he said, "associations of local citizens" continued to be active, and while control must rest with the service, Albright assured the trustees they would find the Park Service "anxious to use its services." He did not go so far as Straus, who told them that the advice of local groups "had been taken 99 times out of a 100[sic]."[47]

Ethel Roosevelt Derby and Bertha Rose expressed an interesting reservation. As Mrs. Rose put it, she had "not been brought up with the idea of putting her hand in the Federal grab-bag for money." It was with difficulty that she reached the decision to donate Sagamore Hill; one reason, in Ethel's words, was that she put the National Park Service in a "special place." But there was another reason to banish doubt: as Mrs. Rose said, the NPS guaranteed "permanency," and this was what the trustees most wanted. As Straus reminded them, "the Executive Committee had more-or-less agreed that it [National Park Service acquisition] would be the only recourse for the Association to protect the future of the properties."[48]

Much later, Oscar Straus recalled that the idea of giving Sagamore Hill to the National Park Service was Albright's.[49] At the time, Straus told the trustees the idea had come to

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[45] RMA Executive Committee Minutes, January 2, 1951.

[46] RMA Executive Committee Minutes, January 9, 1961.

[47] RMA Executive Committee Minutes, January 9, 1961.

[48] RMA Executive Committee Minutes, January 9, 1961.

[49] Oscar Straus, interview with the author, October 22, 2003.

him in discussion with fellow trustee Bertha Rose, who had wide experience with historic houses and period rooms, and was an admirer of the Park Service. Either way, Albright played a pivotal role in moving the idea forward. Approaching the NPS at the end of 1960, Straus offered "our Trustee and mutual friend, Mr. Horace Albright" as a negotiating partner. But in fact, Albright had already spoken with both Wirth and Lee,[50] and from this point forward he managed the campaign for the TRA, sometimes standing before the curtain, sometimes behind.

Ronald F. Lee: Advocate From Within

Oscar Straus, many years later, did not recall that Ronald Lee had played a role in starting the negotiations. Yet he did, and quickly became a key advocate within the National Park Service. Ronald Lee was an important figure in the NPS (Fig. 5). With a doctorate in history from the University of Chicago, he had taught history at the college level before going to work for the service's Branch of History in 1934. There he rose quickly to the position of Chief Historian, which he held from 1938 until 1950. Some preservationists know his name for the essential role he played during those years in launching the National Trust for Historic Preservation, of which he became an early trustee. In 1951, he was appointed Assistant Director of the NPS, and during the ensuing years he was instrumental in developing the National Preservation Program, which would lead to passage of the National Historic Preservation Act of 1966. In 1953, he became head of the new Division of Interpretation, and in 1960 went to Philadelphia as Regional Director of the Northeast Region.[51] And there he was – a career officer with almost 30 years of experience in the NPS, impressive portfolios in history and historic preservation, and national stature both inside and outside the service – when the donation of Sagamore Hill reached his desk. It could hardly have found a more knowledgeable or persuasive advocate. for the donation, forwarding Straus's letter to the director, assuring Straus of the NPS's interest in the proposal, meeting with the director, and asking Wirth in a handwritten note early in 1961 to "give Sagamore Hill a push." Lee argued, first of all, that this would support the administration's campaign for environmental conservation, "in view of Secty. Udall's and Pres [sic] Kennedy's references to him as a pioneer in this." Lee then noted:

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[50] TRA Executive Committee Minutes, September 14 and November 30, 1960, and January 9, 1961.

[51] "Ronald F. Lee Papers (1947-1972), NPS History Collection RG1, Preliminary Inventory," at NPS website (www.National Park Service.gov/hfc/library/lic/htm).

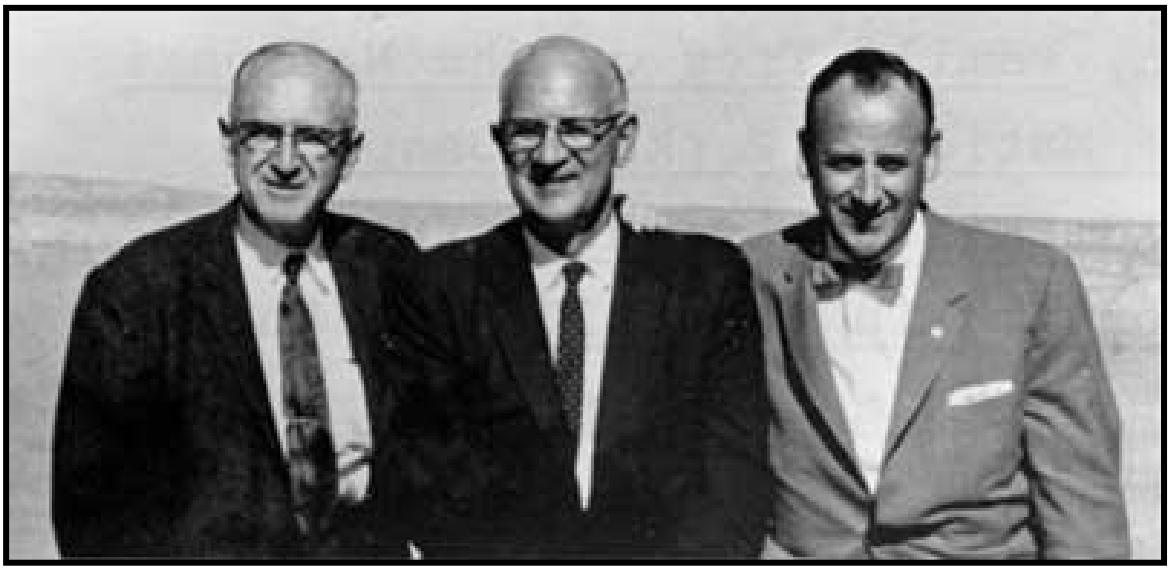

Fig. 5. National Park Service staff and veteran leadership: *top*, three generations of NPS Directors, Horace Albright, Conrad Wirth, and George Hartzog at the Grand Canyon in the 1960s; *above*, Director Wirth (seated at center) with regional directors and chiefs of the design offices. Regional Director Ronald Lee stands directly behind Assistant Director Hillory Tolson (seated to Wirth's left). (Reprinted from Russell Olsen, *Organizational Structures of the National Park Service, 1917-1985*, pp. 6, 80.)

> While it might be a possible alternative for them to offer it to the Natl [*sic*] Trust I think we ought to have it. The Trust is meeting in New York in October & will visit Sagamore Hill with fanfare, & lots of influential people around. I wish we could have it well along before then.[52]

It is not clear, in fact, that a donation to the National Trust was a real option. Two months earlier Horace Albright had dismissed it, remarking that "money has to be raised from the outside and they would not take an area unless it had an endowment" (by which he must have meant a full endowment).[53] But Lee's gambit was shrewd and his message clear: I think we ought to have it.

Tribute to Roosevelt

No one questioned Sagamore Hill's significance for the nation or its authenticity as a testament to Roosevelt. And this was important, for throughout this phase, the emphasis was always and heavily on Roosevelt himself. The enthusiasm was bipartisan, and the only question that was ever raised concerning the appropriateness of preserving Sagamore Hill as a memorial to him was whether Congress might feel there were already enough such memorials. Congress did not, as it turned out, feel that way.

As a potential subject of commemoration, Roosevelt enjoyed an immediate advantage by virtue of having been president. The statistics on the commemoration of presidents are striking. In 1962, the year Congress approved the acquisition of Sagamore Hill and the Birthplace, the National Park system contained about 26 sites that commemorated individuals and bore their names, and of these no less than 15 were presidential. They included sites commemorating Washington (3), Jefferson (2), Lincoln (2), Grant (2), Theodore Roosevelt (2), Franklin Roosevelt (2), John Adams, and Andrew Johnson. This was in addition to Mount Rushmore, which depicted Washington, Jefferson, Lincoln, and (again) Theodore Roosevelt. Evidently 1962 would be a particularly good year for commemorating individuals: six sites were declared, of which three were presidential: Lincoln and Theodore Roosevelt (2). During the next 15 years, a further 22 NPS units would commemorate individuals and bear their names, and of these, 10 were presidential, commemorating Kennedy (2), Lyndon Johnson (2), Van Buren, Lincoln, Theodore Roosevelt (again), Taft, Hoover, Eisenhower. An 11th commemorated Eleanor Roosevelt.

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[52] Memorandum, Lee to Wirth, March 11, 1961; NARA II - College Park, Office Files of Conrad Wirth, Box 22, Region V-VI: Folder: Region V 1961.

[53] TRA Executive Committee Minutes, January 19, 1951.

Being president was evidently a good step towards being memorialized by the National Park Service. But how many memorials were too many? Roosevelt was already abundantly commemorated: at Mount Rushmore, Theodore Roosevelt National Park in North Dakota (which included the cabin of his ranching days), and Theodore Roosevelt Island in Washington, D.C. The latter was a memorial site purchased by the Roosevelt Memorial Association in 1932. Progress on the memorial itself had been slow, and it was only in 1961 that Congress had approved funding to build it: indeed the RMA was negotiating over the design at the very moment it was attempting to dispose of Sagamore Hill and the Birthplace.[54] Early in 1961, therefore, Albright warned the trustees that "Congress might say that they have done enough for Theodore Roosevelt, that they do not want to take on any more. They might say this," he concluded, "although I rather doubt it."[55] Albright's hunch was correct. Despite abundant commemorations, there was no opposition. New York's Senator Kenneth Keating actually called Congress's attention to the Roosevelt sites already managed by the NPS, and urged the legislators to approve the addition of two more. For Keating, five Roosevelt sites were not too many.[56]

Presidential commemorations were popular – at least for certain favored presidents. Roosevelt belonged to that select group. And indeed he was no ordinary president: he was a fantastically vivid character who appeared as a central character almost anywhere you looked in twentieth-century history – the Russo-Japanese War, the Panama Canal, the national forests, muckraking, reform politics. In the political debates over Sagamore Hill, he seemed to loom larger than life, an iconic great American. In remarks at Sagamore Hill, and in a letter to House Speaker Sam Rayburn, Interior Secretary Stewart Udall cited Roosevelt's "great role as peacemaker and defender – an American whose big stick and soft words have become an American heritage."[57] To Senator Jacob Javits of New York, Roosevelt was "more than just one of our greatest

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[54] See, for example, TRA Executive Committee Minutes, January 27, 1961. The island is administered through the George Washington Memorial Parkway Unit of the NPS.

[55] TRA Executive Committee Minutes, January 9, 1961. Later in the same meeting, trustee Leonard W. Hall worried that "it might not go through Congress inasmuch as the TRA had really used a shotgun on the subject of TR." But in general, the TRA was, and remained, confident.

[56] Senate Debate on H.R. 8484, July 18, 1962. The sites enumerated by Keating were the Maltese Cross Cabin in Medora, ND; the Elkhorn Ranch home site in Theodore Roosevelt National Memorial Park; and Theodore Roosevelt Island. He did not mention Mount Rushmore.

[57] "Remarks of Secretary of the Interior Stewart L. Udall, Sagamore Hill, New York, August 2, 1961," DOI Information Service, For Release August 3, 1961; John F. Kennedy Presidential Library, NARA -Boston, Select Department of Interior Records, Microfilm Project NK17 (photocopies in SAHI Curatorial Files). Identical text in letter of Udall to Speaker Sam Rayburn, included in report of Senate Committee on Interior and Insular Affairs to accompany H.R. 8484, in 87th Congress, 2nd Session, Calendar No. 1688, Report No. 1729.

Presidents": he was also "a symbol of the American spirit."[58] New York's Senator Keating thought the homes would commemorate Roosevelt's "hard-hitting spirit" and many services to his country.[59] For Congressman Rutherford of Texas, the sites would pay "tribute to a great American."[60] All of this was very much in line with the TRA's earliest impulse to "perpetuate the memory of Theodore Roosevelt." Elihu Root, who had sought a "true memorial of our friend" – one that would "interpret to the future the nobleness of his qualities, the greatness of his character, the inspiration of his life" – would not have been disappointed by the legislative debate of 1962.

A Moment for Bipartisanship

Theodore Roosevelt was a Republican. At Sagamore Hill's opening in 1953, another Republican, President Dwight D. Eisenhower, had stood on its broad veranda and declared it a National Shrine. Press photographs showed him being welcomed by yet another Republican, former President Herbert Hoover.[61] The Roosevelt Memorial Association itself, and later the Theodore Roosevelt Association, continued to be predominantly and actively Republican, and it was to the Republican administration of President Eisenhower that Straus directed the association's offer. With a Democrat about to move into the White House, the donation could easily have fared less well than it did. But by the beginning of 1961, the TRA knew that Kennedy had decided to retain Conrad Wirth[62] (who had been appointed by the Democratic President Truman), and by 1962 Straus was confident that Kennedy would sign the legislation. Still, he understood the significance of crossing party lines, and acknowledged it nicely in his invitation to attend the dedication ceremony Sagamore Hill.[63] In the end Kennedy did not attend, but

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[58] Senator Jacob Javits, speech in support of H.R. 8484, July 18, 1962; *Congressional Record*, p. 13938.

[59] Senator Keating, in *Congressional Record*, Senate, August 9, 1961, p. 14161.

[60] Congressman Rutherford, supporting H.R. 8484, Proceedings of the House of Representatives, 87th Congress, 2nd Session. *Congressional Record*, Volume 108, Part 4, p. 5525 (April 2, 1962).

[61] Photograph reproduced from the *New York Times* in "Sagamore Hill" (brochure), NPS, n.d., p. 16.

[62] TRA Executive Committee Minutes, January 27, 1961.

[63] "...as Theodore Roosevelt is part of our heritage, whether we be Republicans or Democrats, it seemed to me that it would be particularly fitting if you could find time, in an overcrowded schedule, to accept these properties" (letter, Oscar Straus to President Kennedy, September 7, 1962); John F. Kennedy Presidential Library, NARA -Boston: President's Office Files, Departments and Agencies, Box 80, Folder: Interior – Sagamore Hill 4/63 (copies in SAHI Curatorial Files). Also letter, Straus to Wirth, July 20, 1962: "In view of the President's interest in the matter, I am sure that there is no question of it being signed"; NARA -Philadelphia, Correspondence Files regarding Establishment of

this was certainly not a political gesture: Secretary Udall urged him to go and emphasized that doing so would "add a strong bipartisan note" to his New York visit.

Roosevelt the Environmentalist

Udall was clear about why he wanted Kennedy to attend: "Conservation-wise," he explained, "the more we associate ourselves with Teddy Roosevelt and his philosophy, the better!"[64] The Kennedy administration was advancing an ambitious national conservation agenda, and Roosevelt-the-conservationist quickly became a leading theme in the campaign for authorization. Indeed it probably goes a long way towards explaining the administration's eagerness to support the acquisition.

On March 1, 1962, while the legislators were considering Sagamore Hill, Kennedy spelled out his conservation agenda in a major speech to Congress. It focused on acquiring large amounts of land and providing outdoor recreation for an increasingly sedentary population. The effort would be concentrated – unlike existing parks – in the east and in cities. Kennedy urged Congress to approve 10 new natural areas and one historic site: Sagamore Hill.[65]

Even before Kennedy took office, the Outdoor Recreation Resources Review Commission, established in 1959, had led the Secretary of the Interior to create a new Bureau of Outdoor Recreation. Now, both the NPS and Congress began energetically to explore new forms of park designation. In 1961, Congress approved the first national seashore, at Cape Cod (MA), and the following year Kennedy was pushing for a second at Point Reyes (CA). The year 1963 saw passage of the National Outdoor Recreation Act and a Congressional mandate for the Bureau of Outdoor Recreation. The environmental effort continued through the Johnson and into the Nixon administrations, with the Wilderness Act in 1964, the Land and Water Conservation Fund Act in 1965, the Wild and Scenic Rivers Act and the National Trails System Act in 1968, and the National Environmental Policy Act in 1969. And these great innovations were accompanied by a dramatic upsurge in new NPS areas. Nine were declared in 1962: the largest number year in office, but under Johnson the numbers rose yet further.

Park Service Sites at Sagamore Hill and Theodore Roosevelt's Birthplace (digital copy: NRBPA-79-413-ROOSEVELT(A), No. 2).

[64] Letter, Secretary Udall to President Kennedy, April 10, 1963. John F. Kennedy Presidential Library, NARA -Boston: President's Office Files, Departments and Agencies, Box 80, Folder: Interior – Sagamore Hill 4/63 (copy in SAHI Curatorial Files).

[65] President John F. Kennedy, "Our Conservation Program: Message from the President of the United States Relative to Our Conservation Program," March 1, 1962, House of Representatives, 87th Congress, 2nd Session, Document No. 348.

Though it offered neither land nor outdoor recreation, Sagamore Hill was drafted into the burgeoning environmental campaign. What it had was Theodore Roosevelt. Ronald Lee was among the first to recognize the significance of the linkage. Urging Conrad Wirth to "give Sagamore Hill a push," he reminded the director that "Teddy Roosevelt was a great conservationist, and this might be timely in view of Secty. [*sic*] Udall's and Pres [*sic*] Kennedy's references to him as a pioneer in this." Udall took the hint. In remarks delivered at Sagamore Hill in the summer of 1961, he began by sketching a frightening image of "civilization's asphalt" closing in on America, then declaimed "We need more historical shrines such as Sagamore Hill to remind us of the role nature's settings can play in the shaping of America's physical and moral strength." Roosevelt exemplified the "curative powers of nature," and demonstrated Emerson's axiom that there is "no police so effective" as natural places "where boys can run and play and dispose of their superfluous strength and spirits." With a perfunctory nod to Sagamore Hill as a "many-faceted mirror of American history," Udall devoted seven of the speech's eight paragraphs to images suggestive of Roosevelt's status as "one of this Nation's great conservationists." He wound up by calling on "all of us, Government on all levels, private philanthropies and individuals," to provide more of those "good hills and wide pastures" whose curative and corrective powers Roosevelt had demonstrated.[66]

Two years later, Udall spoke again at Sagamore Hill's dedication ceremony. It was a remarkable speech. Udall did not mention the Russo-Japanese War; never hinted at the Nobel Peace Prize that Roosevelt had won largely on the strength of diplomacy carried out at Sagamore Hill; did not spare a passing glance for the Panama Canal or the Rough Riders. For that matter, he had nothing to say about the Theodore Roosevelt Association, which had preserved the house, and whose leaders had just turned it over together with a check for half a million dollars. With the merest nod toward the house itself, Udall moved directly to Roosevelt's "love affair with nature," hammering home the importance of his environmental legacy to a nation "teetering on the brink of overcrowding and under providing for out-of-door recreation opportunities." Then, having established the link with Roosevelt, he launched into what might be described as a campaign speech for the administration's conservation agenda. Though he did invoke Roosevelt from time to time, it was never Roosevelt carrying a big stick, charging up San Juan Hill, or shaking a fist on the campaign trail. The Roosevelt he put before his listeners was "looking out over the faces of ranchmen and cowboys to the arching sky beyond." Beneath the rhetoric, Udall's message was simple: conservation must "take its

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[66] "Remarks of Secretary of the Interior Stewart L. Udall, Sagamore Hill, New York, August 2, 1961."

place at the head table at budget time," so that government could buy land before development and spiraling prices put them "beyond the reach of the public purse." Udall conjured up other images: Roosevelt leading "sweating, panting, softly cursing" dignitaries on "bone-bruising" hikes through Washington's Rock Creek Park, Roosevelt as the sort of president who would "prefer a touch football game on the White House lawn to sitting in front of a television set" – Roosevelt, in fact, as a president much like Kennedy. In conclusion, Udall called on his audience to honor Roosevelt's memory by following his example and devising a new "land ethic" that would be as well suited to the challenges of the 1960s as Roosevelt's had been to the 1900s.[67]

This was an extraordinary conclusion for a speech billed as a dedication address for a historic house. Udall had barely alluded to Sagamore Hill; had never uttered the name. The speech suggests how single-mindedly the administration saw Sagamore Hill through the medium of its own conservation program. The administration was not alone. Recommending passage of the enabling legislation just weeks after Kennedy's conservation address, the Interior and Insular Affairs Committee's report described Roosevelt's many other achievements as "so well known that nothing will be added" by further discussion, but dwelt on the ways in which the committee's own work drew upon his environmental legacy. The Reclamation Act, Antiquities Act, the government's first hydroelectric power projects, at least 25 reclamation projects, and 20 major additions to the National Park system (11 mentioned by name) "remind the committee, in a very direct way, of the American people's debt to him."[68] Most remarkable, though, is that the Theodore Roosevelt Association – which certainly saw Roosevelt in a broader light – appears to have showed no displeasure at the administration's single-minded focus. The association's teacher's manual "Theodore Roosevelt and Responsible Citizenship," written about the same time, highlights Roosevelt's interest in nature, and places conservation first among issues for teachers to consider.[69] No doubt Gifford Pinchot would have approved. And in an otherwise-factual press release dated two weeks before Kennedy's speech to Congress, the TRA remarked that "the vitality of the present program of conservation" was one of Roosevelt's important legacies: he "made the

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[67] "Remarks of Secretary of the Interior Stewart L. Udall at the Acceptance of the Deed to Sagamore Hill National Historic Site..., July 8, 1963," DOI, For Release July 9, 1963; National Park Foundation. The department's press summary, released on the same date, was equally single-minded in its focus on conservation.

[68] Report of the Committee on Interior and Insular Affairs, to Accompany H.R. 8484, March 21, 1962. House of Representatives, 87th Congress, 2nd Session, Report No. 1475.

[69] *Theodore Roosevelt and Responsible Citizenship: A Teacher's Manual of Suggested Class Activities* (New York, NY: TRA, published 1957, revised 1962), see esp. pp. 11-13, 19-20, 35.

preservation of the nation's natural resources and historic sites and monuments a living heritage."[70]

Sagamore Hill: Arguments for Significance

If Secretary Udall emphasized Roosevelt's conservation legacy, it was not because he failed to recognize Roosevelt's other sterling qualities, or Sagamore Hill's significance as a historic site. Quite the contrary, Udall told both Congress and President that the house and its contents were "the finest existing physical reminders of Theodore Roosevelt, a man who fastened upon his countrymen an image of character and vigor that is valuable to the American tradition."[71] The linkage to which Udall drew attention, the feeling of connection between the man and the "physical reminders" of him, was important, for it was the basis on which the Department of the Interior built its formal case for acquiring Sagamore Hill.

Lee had already begun building the case before the end of 1960. Forwarding Straus's letter, he assured Director Wirth that Sagamore Hill was "without question an historic site of the very first rank."[72] By the following spring a memo on "Suitability" had been prepared, stressing the parks' value as a document of the nation's political and military history.[73] Later that summer, NPS staff carried out the required "Area Investigation Report," a detailed analysis that, as Lee explained, would be used by "various Congressional committees" considering the legislation.[74] The report made the case for Sagamore Hill's significance as Roosevelt's own creation, his long-time family

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[70] TRA press release, "President Kennedy Expected to Ask Congress to Add Manhattan Birthplace and Long Island Country Home of 2nd President to Nation's Shrines," February 16, 1962; NARA-Philadelphia, Box 6, NPS Northeast Office Administrative Correspondence 1953-68, Folder: Sagamore Hill 9/61-4/64.

[71] Letter, Udall to Kennedy, July 31, 1961; John F. Kennedy Presidential Library, NARA -Boston, Select DOI Records, Microfilm Project NK17 (photocopies in SAHI Curatorial Files). Identical text in letter, Udall to Speaker Sam Rayburn, included in report of Senate Committee on Interior and Insular Affairs to accompany H.R. 8484, in 87th Congress, 2nd Session, Calendar No. 1688, Report No. 1729.

[72] Memorandum, Lee to Wirth, December 9, 1960; NARA -Philadelphia: NPS Northeast Office Administrative Correspondence 1953-68, Box 6, Folder Sagamore Hill 10/53-8/61.

[73] The memorandum proposed that both Sagamore Hill and the Birthplace would "fall logically under Theme XXI of the National Survey of Historic Sites and Buildings (Political and Military Affairs, 1865-1910)." This theme, it argued, was underrepresented in the system, and while it already included other Theodore Roosevelt sites, those really fell under Theme XIX, Development and Conservation of Natural Resources. "Suitability," unsigned and undated paper, attached to Follow-up Slip, Roy Appleman to Wirth, March 17, 1961; NARA -Philadelphia: NPS Northeast Office Administrative Correspondence 1953-68, Box 6, Folder Sagamore Hill 10/53-8/61.

[74] Letter, Lee to Straus, January 29, 1962; NARA -Philadelphia, Box 6: NPS Northeast Office Administrative Correspondence 1953-68, Folder: Sagamore Hill 9/61-4/64.

home, and the Summer White House. But there were other strands to the argument, too: the quality of the buildings (the house was a "fine Victorian structure"), their condition (the house was "excellent," other buildings and grounds were "in good condition and well managed"), and park planning issues (the setting was sympathetic, transportation was good, the site was already popular with visitors, there were no "development and operational problems"). Even Old Orchard, the neo-Georgian mansion built to Roosevelt's son Theodore, Jr., in 1938, was praised. In sum, the authors of the "Area Investigation Report" had no doubt that Sagamore Hill was "eminently worthy of preservation as a unit of the National Park System." But it was the North Room that most vividly caught their imaginations, and there it was once again the linkage to Roosevelt that stirred them; for it was in the North Room, "crammed with trophies, books, paintings, flags, and furniture, that the spirit of Theodore Roosevelt is most vividly felt. To enter it is to step back into the time of The Big Stick, The Great White Fleet, the Panama Canal, the era of Muckrakers and Trust Busters, and the struggle to conserve public lands."[75]

The Endowment

The Theodore Roosevelt Association had long known that it would be difficult, if not impossible, to find responsible guardians for its two houses without endowing them, and so, from its earliest approach to the National Park Service in 1960, the association held out the promise of an endowment. The TRA would eventually donate $500,000 and, later on, the belief took hold among all concerned that this figure represented what had always been contemplated. It came to be asserted, too, that it represented half of the association's own endowment at the time.[76] Neither assertion was correct. Early discussions had featured much larger amounts. Shortly after Straus's first letter of 1960, as Director Wirth was considering the suitability of the two properties for inclusion in the National Park system, Lee told him the sum under discussion was $800,000. Another staff member informed the director it was "about $850, 000," and staff was still quoting this figure in mid-March.[77] The latter amount would have equaled almost nine-tenths of

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[75] Coryell, Failor, and Shedd, "Area Investigation Report," pp. 9, 11, 19, 32, 33.

[76] See, for example, John Gable's account of the TRA's relationship with the NPS, written for his trustees: "The Sagamore Hill Committee and the Prologue of the Past" (typescript), October 1988; SAHI Archives, TRA Papers, Folder 42, "Cooperating Associations – TRA".

[77] Memoranda, Lee to Wirth, February 6, 1961; NARA -Philadelphia, Box 6, NPS Northeast Office Administrative Correspondence 1953-68, Folder: Sagamore Hill 10/53-8/61). Also Chief, Division of Interpretation, Daniel Beard, to Director Conrad L. Wirth, stamped February 27, 1961, and signed by Wirth on March 2, 1961; NPS Library. Also follow-up slip, Roy Appleman to Wirth, March 17, 1961; NARA - Philadelphia, as above.

the TRA's endowment, and this was consistent with the association's original intent which, as Straus informed his board just before writing to Wirth, was to offer the NPS a "substantial portion" of its endowment fund, retaining only a "small" portion to assure its continuation.[78]

The context in which concerns were most often voiced by NPS staff about the endowment and its size was not Sagamore Hill itself, but rather the question of whether or not the Park Service should also accept the Birthplace. Some professional staff did not want to do so, and at least two urged the director to turn it down, even if the consequence was a smaller endowment.[79] By May, in fact, the promised endowment had shrunk to $500,000, but the Birthplace remained part of the package. Meanwhile, the TRA's endowment was rapidly rising in value, so that by the time of the transfer, the donation of $500,000 represented a little more than 40% of the association's total endowment. All of this is described more fully in Chapter 3. The point to stress in the context of the federal government's acquisition is, simply, that the NPS initially had reason to hope for a much larger donation than it eventually received.

A Problem: The Theodore Roosevelt Birthplace

The house the National Park Service referred to as the "Theodore Roosevelt Birthplace and Boyhood Home"[80] was a structure that stood at 28 East 20th Street in Manhattan. Roosevelt had lived at that location from his birth in 1858 to 1873. The Women's Roosevelt Memorial Association had reconstructed the house in 1923. Later it loomed large in the history of the Theodore Roosevelt Association. And now it was being offered to the NPS along with Sagamore Hill as part of a single transaction. To understand Sagamore Hill's acquisition, it is necessary to understand the role played by the Birthplace. Moreover, the considerations behind the donation of the Birthplace and the factors involved in its acceptance would affect Sagamore Hill's future in many ways.

Apart from sharing a connection with Roosevelt, the Birthplace's life story could hardly have been more different from Sagamore Hill's. As its once-residential surroundings had become commercial, the original building had been converted into shops and offices. An attic story had been added. Its facade had been largely hidden behind a very large bay with great plate glass windows on three sides. And eventually the

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[78] TRA Executive Committee Minutes, November 30, 1960.

[79] Memorandum, Beard to Wirth, February 27, 1961, and follow-up slip, Appleman to Wirth, March 17, 1961.

[80] Coryell, Failor, and Shedd, "Area Investigation Report," p. 22.

whole business had been replaced by a two-story brick building whose front wall rose about 12 feet in front of the original facade. Even then, faint traces of the Roosevelt presence survived, for the house of Theodore's uncle still stood – much altered – next door. The Women's Roosevelt Memorial Association bought both pieces of property, demolished the eastern half, reconstructed the birthplace house on the site, combined the two houses into a single building, and in 1923 opened it to the public. It was this property that the TRA now offered to the NPS as a pendant to Sagamore Hill.

The Theodore Roosevelt Association was determined to give it away. Albright and Straus made it clear that this was a "package deal" involving "all of the Association's properties"[81] The service's response was ambivalent. In passing Straus's letter along to the director, Lee was enthusiastic about Sagamore Hill, silent about the Birthplace. Wirth took the cue: answering Straus's letter, he tactfully avoided mentioning the Birthplace at all. Others were less circumspect. As early as October, Assistant Regional Director Palmer advised Lee that the service would do better having a single Roosevelt site – Sagamore Hill, with Old Orchard restored to it – than having two sites "with the limitation that one was a reconstruction without historical associations." Acting Director Cook agreed with Palmer and told Lee so: he suggested giving "serious consideration" to selling the Birthplace and concentrating on Old Orchard.[82]

It became clear that the "principal issue" in accepting the Theodore Roosevelt Association's offer was whether to take the Birthplace.[83] The proposition was not without backers, but their support was tepid. The "Suitability" memorandum judged both houses to be qualified for entrance into the system, but, compared with Sagamore Hill, the Birthplace left "something to be desired." Supervisory Park Historian Thomas Pitkin, who studied the Birthplace with great care, concluded it had "considerable educational potential, not fully developed. It would not, if acquired, by any means discredit the National Park System." Yet Pitkin's appreciation may have been sharpened by the "lovely office space" he described to Lee in a handwritten postscript – "probably enough to house N.Y.C. Area headquarters."[84]

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[81] Straus told the trustees his "informal talks" with Wirth had concerned the NPS "taking all of the Association properties with the exception of a small endowment held back by the Association in order to make certain that the TRA could be kept together in some working form"; TRA Executive Committee Minutes, January 9, 1961.

[82] Memoranda, George A. Palmer to Lee, October 24, 1960, and Acting Director Cook to Lee, November 25, 1960; NARA -Philadelphia, Box 6, NPS Northeast Office Administrative Correspondence 1953-68, Folder: Sagamore Hill 10/53-8/61.

[83] Follow-up slip, Roy Appleman to Wirth, March 17, 1961.

[84] "Suitability" Paper and Memorandum, Pitkin to Lee, January 30, 1961; NARA -Philadelphia, Box 6, NPS Northeast Office Administrative Correspondence 1953-68, Folder: Sagamore Hill 10/53-8/61.

Against these half-hearted champions was set Assistant Regional Director Palmer. And he was not alone. Lee might tell Director Wirth that the promise of an $800,000 endowment "supports the propriety" of taking both houses, but Daniel Beard – Chief of the Division of Interpretation – advised the director that even an $850,000 endowment would not justify taking the Birthplace. Apart from five restored rooms, Beard thought the rest of the house bore "little resemblance to the original." He didn't like the commercial setting, and parking was difficult. He didn't like the finances either, noting that the income from $850,000 would "hardly pay" for operating costs that were running about $50,000 per year. Asked to brief the director in preparation for a meeting with Oscar Straus, leading NPS Historian Roy Appleman put it more bluntly: "The Service would be better off from every angle to take Sagamore Hill without a penny of endowment than to accept the Birthplace House and Sagamore Hill with the endowment."[85]

The Birthplace had only one real champion within the service, and that was Ronald Lee. He used Pitkin's lukewarm assessment as grounds for recommending that the enabling legislation include the Birthplace. But even Lee was hardly enthusiastic. The house's long-term use was unclear: perhaps some other agency might operate it. He suggested that the legislation allow Interior to "transfer or assign the property to other governmental units or public or quasi-public organizations or to dispose of it with the proceeds being added to the endowment." And later, more succinctly: We should "get authority to take it, provided it include [sic] authority to dispose of it later on, if we want to."[86]

It looked briefly as though Palmer and Cook, Beard and Appleman might prevail. Immediately after receiving Beard's memorandum, Wirth told Straus that the NPS had given "further thought" to the two sites and had decided to omit the Birthplace from the authorizing legislation, "as our reports indicate that the changes which have been made are so great that it would have little public interest.[87] The TRA seemed to believe that both Wirth and Udall were "very much in favor of acquiring these two places,"[88] but in

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[85] Memoranda, Lee to Wirth, February 6, 1961; Beard to Wirth, February 27, 1961; and follow-up slip, Appleman to Wirth, March 17, 1961. The full text of Beard's recommendation reads: "In your discussion with the Trustees of the Roosevelt Association, we recommend you try to persuade them to retain the Birthplace and if necessary, the endowment, but that they turn over Sagamore Hill to the National Park Service."

[86] Memoranda, Lee to Wirth, February 6, 1961 and March 11, 1961.

[87] Letter, Wirth to Straus, stamped March 3, 1961 (carbon copy in NPS Library, Washington, D.C.).

[88] For Wirth, see TRA Executive Committee Minutes, January 27, 1961. For Udall, see June 15, 1961. The phrase quoted was used in reference to Wirth.

fact, Wirth was waging a struggle to evade the gift of the Birthplace. He was losing. Three months after receiving the Birthplace-less bill, the TRA was still pushing for its donation (and, simultaneously, for a reduction in the promised endowment). Wirth tried to shore up his position:

> I know we discussed this [the donation of the Birthplace] and that I indicated we would include it; however, after seeing it and talking to several people, including members of the Roosevelt family, I cannot see where we would be justified in accepting it and assuming the additional financial burden.[89]

Now things happened quickly. The Theodore Roosevelt Association made it clear that the Roosevelts favored the donation. Albright wrote a "confidential and long" letter to Wirth, reminding him of the telephone conversation the previous winter in which Albright had told Wirth "this had to be a package deal or nothing."[90] Two weeks later, Wirth wrote again to Straus – "airmail special delivery" – to say he had discussed the matter again with Secretary Udall and Horace Albright, and was enclosing a revised bill covering both houses.[91] Straus read the letter to the trustees the following day; Albright described it as the "result" of his intervention.[92]

This must have been a bitter pill for Conrad Wirth. Or perhaps he saw in the concession a chance to negotiate for a larger share of the endowment, for that is what he did, telling Straus that, "After studying this more carefully, we believe that we should have $750,000 in the beginning, rather than the $500,000 previously considered." He put the higher amount into the new bill draft. But it was no use. The Birthplace stayed in the bill. The extra $250,000 came out.

The TRA did briefly consider the higher endowment figure, but "Mr. Straus said that we could not buy Old Orchard if we gave them $750,000." Old Orchard was, of course, the Georgian-style house that Roosevelt's son had built for himself in 1938 on land that had been part of Sagamore Hill. Since the TRA and the NPS had already agreed that Old Orchard would be incorporated into the Sagamore Hill donation, this was a reasonable consideration. On the other hand, it was far from clear that it was a $250,000

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[89] Letter, Wirth to Straus, June 1, 1961, with revised draft of bill attached, authorizing acquisition only of Sagamore Hill; NPS Library, and NARA -Philadelphia, Box 6, NPS Northeast Office Administrative Correspondences 1953-68. Wirth's restatement of his position was in direct response to Straus's letter of May 24, 1961, concerning the endowment; this is discussed in Chapter 3.

[90] According to Horace Albright: TRA Executive Committee Minutes, June 15, 1961. The letter itself has not been located.

[91] Letter, Wirth to Straus, June 14, 1961; appended to TRA Executive Committee Minutes, June 15, 1961.

[92] TRA Executive Committee Minutes, June 15, 1961.

consideration. At the same meeting, Straus told the trustees the asking price for Old Orchard was $135,000; and that Theodore Roosevelt, III, had been told that "$75,000 was a fair price." Other trustees guessed the association could have it for $80-85,000, and in July, Straus made a formal offer of $75,000.[93] (The sale would eventually close at $115,000.) Meanwhile, Straus told the committee that the TRA's endowment had grown to $1,044,176 – "a gain of $211,196."[94] Within six weeks, it would grow by a further $155,824, standing at $1,200,000 by the end of July.[95] The association was becoming wealthier by the minute. In addition, by mid-July, Oscar Straus had struck a deal to sell 11 acres of Sagamore Hill, netting the TRA a further $40,000.[96] He told the trustees (and perhaps also the Park Service) that the proceeds would be used to fund the purchase of Old Orchard.[97] And Straus was negotiating – successfully, in the end – to have the NPS hire the association's long-time curators, which would relieve it of the pension obligation that Straus had pointed to as the association's reason for needing to retain funds.

In July, NPS staff carried out field work for the required "Area Investigation Report" that would be presented to Congress.[98] By this time, NPS leadership had decided to take the Birthplace, and one would expect the report to support this policy. Yet reading it, one may infer that its authors – an architect, a park planner, and a historian – were uncomfortable with the decision. While they did not condemn the house outright, neither could they bring themselves to say anything very positive about it. Instead, they said as little as they could. Whereas their analysis of Sagamore Hill opens with a "Statement of Significance," the Birthplace has none; where the section on Sagamore Hill ends with "Conclusions and Recommendations," the Birthplace has none.

The report's reservations about the Birthplace began with its surroundings, "almost completely commercialized with shabby undesirable structures," and "not an appropriate setting" for a historic site or presidential shrine. These were the years when the National Park Service was clearing Philadelphia's Center City of its finest nineteenth-century buildings (including the greatest works of Frank Furness) in order to give

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[93] Letter, Straus to Theodore Roosevelt III, July 20, 1961; SAHI Archives, Central Files, Folder H15.

[94] TRA Executive Committee Minutes, June 15, 1961.

[95] Oscar Straus, "Memorandum for the Trustees of the Theodore Roosevelt Association, July 2, 1961; SAHI Archives, TRA Papers, Folder H15: Legislative Histories.

[96] Letter from Straus to Bertha Rose, July 18, 1961; SAHI Archives, TRA Papers, Folder H15. See also resolution to sell 11 acres, TRA Executive Committee minutes, October 5, 1961.

[97] TRA Annual Meeting Minutes, 1961.

[98] Coryell, Failor, and Shedd, "Area Investigation Report." The authors state (p. i) that they carried out the fieldwork on July 5-7.

Independence Hall an appropriate setting, and a similar aesthetic can be glimpsed here. In fact, the report's authors urged the Park Service to try to interest the city of New York in an "urban renewal program to raise the quality of the area to Service standards, similar to Society Hill in Philadelphia."[99] But there were other problems with the Birthplace. Visitation was low: a mere 16,000 annually. And the problems of authenticity were puzzling. During the reconstruction, two houses – the Roosevelt house and its neighbor – had been combined into a single building. The reconstructed Roosevelt house contained no material from the original house. Nor was the reconstruction entirely accurate (thanks to new building codes and fire laws) or complete. While the first and second floors contained reconstructed rooms, the third and fourth floors had modern offices and an auditorium. In short, the Birthplace did not meet the standards expected of a historic house within the National Park system.

Unable to defend the Birthplace's authenticity, the authors of the "Area Investigation Report" discovered other standards that it could meet. They quoted TRA Director Hermann Hagedorn's early assessment that the reconstructed house would "more nearly resemble" the Roosevelt birthplace than the property had done at any time in the last 50 years. Moreover – again quoting Hagedorn – "bricks and mortar are the least important of the materials that have gone into the creation of ROOSEVELT HOUSE." Better, they argued, to focus on the "astounding amount of research" that went into the recreation, and on the house's sheer inspirational value.[100] Yet the authors did not really endorse Hagedorn's views. Indeed they offered no assessment of their own. On every important aspect of Sagamore Hill they had presented the most positive verdict. On the Birthplace they offered none at all.

They may have tried. On September 8, Acting Regional Director J. Carlisle Crouch transmitted the report "as revised" to Director Wirth. He pointed out that, as he and Wirth had agreed, "certain portions of the planning section for the Birthplace were deleted."[101] One cannot help but wonder whether comments critical of the house were part of the deleted material.

The NPS now adopted a policy of public muteness on the Birthplace. Officials avoided comparison with Sagamore Hill; supporters in Congress did the same. Secretary Udall might tell Congress and the President that Sagamore Hill offered "the finest existing physical reminders of Theodore Roosevelt," that it was "an important historic

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[99] Coryell, Failor, and Shedd, "Area Investigation Report," p. 36.

[100] Coryell, Failor, and Shedd, "Area Investigation Report," p. 26.

[101] The memorandum also notes that corrections had been made to the staffing schedule for the Birthplace. Memorandum, Crouch to Wirth, September 8, 1961; NARA - Philadelphia, Box 6, NPS Northeast Office Administrative Correspondence 1953-68, Folder: Sagamore Hill 9/61-4/64.

site worthy of preservation," that its development as such "presents no problems as it provides almost an ideal setting." But on the merits of the Birthplace he would remain silent, noting merely that it had been largely reconstructed, that the top floor had been converted into an auditorium, and that it "is not self-supporting at the present time."[102]

Meanwhile, Straus told New York's Senator Javits that the properties were "an inseparable unit."[103] And so Congress treated them. But some influential legislators may have been unhappy with the package. A month after writing to Javits, Straus wrote anxiously to Conrad Wirth that he was "very much concerned" about the Senate, specifically its attitude towards the Birthplace. He asked Wirth to lobby Senators Anderson and Bible.[104]

The legislation moved forward, and on July 25, 1962, the Senate authorized the National Park Service to acquire Sagamore Hill, together with the Birthplace – a house that its own experts considered problematic at best, and that the same experts calculated would add almost 37% to the cost of operating Sagamore Hill.[105] At the same time, the endowment would be substantially smaller than what was originally proposed; and much of that, as we shall see, would go to the Birthplace.

The Birthplace Problem, from the TRA's Perspective

If acquiring the Birthplace presented such a problem for the National Park Service, one might ask why the Theodore Roosevelt Association was so anxious to shed it. The answer is simple: the Birthplace was extremely expensive to operate. The association could not continue to do so and remain viable. While giving away Sagamore Hill might help, it would not help enough. At the same time, the TRA genuinely cared for the Birthplace: they wanted to ensure its future as a historic site. To understand the position of the Park Service's negotiating partner in 1960-61, it is helpful to trace the

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[102] Letter, Udall to Kennedy, July 31, 1961.

[103] Letter, Straus to Sen. Jacob Javits, February 8, 1962; SAHI Archives, TRA Papers, Folder H15.

[104] Letter, Straus to Wirth, March 9, 1962, with handwritten annotation "ans by phone, 3/15."; NARA II - College Park, NPS Records, Box 80: NPS Property Mgmt. & General Services L58 - NY Pt.1 - L58 Oregon: Administration Files, Folder: L58 Pt. 1 NY 1/1/62-6/30/62]. Neither NPS Archives nor published Congressional papers contain any record of the legislative concerns that worried Straus.

[105] The "Area Investigation Report" (pp.35, 38, 39-40) put maintenance costs for the Birthplace in 1961 at a little over one-fifth of Sagamore Hill's, but projected that over time its budgetary impact would rise: after five years, annual operating expenses would equal almost 37% of Sagamore Hill's. Current maintenance costs were $9,113 for the Birthplace and $41,980 for Sagamore Hill. Projected expenses after five years were $39,385 for the Birthplace and $108,505 for Sagamore Hill. The latter figures include personal services and direct expenses.

association's relationship to the Birthplace as it evolved during the preceding decade or so.

The problem of the Birthplace, from the association's point of view, had become clear as early as 1941. That was when Executive Director Hagedorn, warning that the house was consuming both "capital and income," urged the trustees to sell it. It was not the RMS's only financial drain: there was also the park in Oyster Bay, in which the association had invested more than $600,000. In 1942, the trustees calculated that giving it to the town would save the association about $6,000 annually,[106] and this was done the following year. But the Birthplace presented special challenges. Hagedorn presented two options: either turn the house over to some other group, or give it a "living function in the community which will draw support for it from succeeding generations regardless of their personal feeling for Theodore Roosevelt." The problem with the first option was that, before any other organization would take the house, the RMA and the WRMA together would have to fully endow it, "in which case the Associations might as well continue to run the House themselves." The second option reveals Hagedorn's understanding that the problem of the Birthplace went beyond the bottom line. At present, it was "just a museum and a library," and a place for school children to visit. To ensure its survival would require making it "so vital a part of New York City that the public would insist on its continuance, and support it, not primarily as a memorial to Theodore Roosevelt, but as an institution which the community needs to fulfill certain specific practical purposes." Hagedorn proposed to offer the house's auditorium and meeting rooms to some of the "admirable civic and welfare organizations" in the neighborhood and "in the Theodore Roosevelt tradition," such as the Common Council for American Unity, the Boy Scouts, or the Welfare Council. The house should become, in short, a "center for the promotion of American understanding and national unity."[107]

Hagedorn's proposal was solidly in line with the founders' vision of a muscular organization dedicated to promoting, and not merely remembering, Theodore Roosevelt's spirit. Nevertheless a "difference of opinion" developed "between the ladies and Mr. Hagedorn as to the uses to which Roosevelt House should be put; the ladies feeling that it should be treated as a museum...." The Common Council for American Unity caused particular concern, for "the ladies had certain doubts as to the wisdom of bringing the foreign-born to Roosevelt House at this time." And on this question of "working with aliens," the RMA's executive committee was inclined to agree. Hagedorn

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[106] TRA Annual Meeting Minutes, 1942.

[107] Memorandum from Hermann Hagedorn to the Executive Committee, December 12, 1941; appended to RMA Executive Committee Minutes, December 22, 1941.

was stymied. He offered one more warning: that "in the years to come, it would be increasingly difficult to secure public support for a static memorial," and that, if the associations did not make the house "vitally useful in the present," it would one day find itself without that support.[108]

After the purchase of Sagamore Hill, the Birthplace problem became acute. Though not its owner, the Theodore Roosevelt Association was putting about $6,000 into the house each year. Trustee Howard Smith in 1950 and the National Trust's Frederick Rath in 1953 had strongly urged the association to sell or give it away. But matters remained unchanged until 1954, when the merger of the two memorial associations was approved and, as Hagedorn said to the trustees, "the financial responsibility for the maintenance of the house is...on our doorstep." In a lengthy document, Hagedorn now re-argued his proposals of 1941, but with greater urgency and in greater detail. The house should no longer be merely a "personal memorial and historic shrine" but, instead, a "NATIONAL CENTER FOR THE CULTIVATION OF THE AMERICAN SPIRIT." The choice was stark:

> ...we can run the House on the lowest possible budget, limiting its activities to the bare essentials of maintaining the restored rooms and the exhibits, and receiving the school children; or we can develop a program which shall attract to the House a larger body of public support than it now enjoys, even while we carry forward the large purposes for which the House was established by the Women's Association in the first place.

To survive, argued Hagedorn, the house "desperately needs" a "broader economic base," and the way to provide that was by making its work matter to more people, even to those who might not care that much about Theodore Roosevelt but were "intensely concerned about the present and future of the country." The house must do something that a large number of Americans would recognize as "immediately vital to them."[109]

The expenses of running the Birthplace mounted. In 1955, the Theodore Roosevelt Association's chairman informed the trustees that $50,000 would be required for "much-needed repairs" – and that was on top of $30,000 needed for capital improvements at Sagamore Hill. Many years later, Hagedorn's successor, John Gable, would note that the TRA's income around 1960 was simply insufficient to run both houses. Worse, with its membership aging, the association's ability to continue was in

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[108] RMA Executive Committee Minutes, April 17, 1942.

[109] Hermann Hagedorn, "Suggested Program for Theodore Roosevelt House"; attached to TRA Executive Committee Minutes, October 4, 1954.

doubt.[110] The records support Gable's analysis. In 1955, Straus noted that the association's initial endowment of more than $2,000,000 had shrunk to about half that. While much of the money had gone towards worthwhile projects, the income from what remained was not enough to sustain the TRA. To cover its deficits, it was spending about $15,000 from its capital endowment every year.[111] By October 1960, when the TRA was opening negotiations with the NPS, its trustees were facing a budget deficit of $32,000. During 1960-61, as negotiations proceeded, the association revised its budget twice, trimming expenses by a third – yet eight months into the year, it still projected a deficit of more than $12,000, or almost one-fourth of annual income.[112] Though the endowment was growing in value, it could not possibly catch up with the association's operating costs.

The source of the deficits received some discussion. In 1960 – while negotiating the donation of the Birthplace to the NPS – Straus was willing to attribute them to the expenses of the Roosevelt Island memorial in Washington, D.C.[113] The 1958 Roosevelt Centennial had also been expensive. But a look at the TRA's other properties reveals a different picture. During the eight months from October 1960 through May 1961, the association had spent $22,664 to run Sagamore Hill and had taken in $15,480 in admissions and contributions. Additional expenses, such as purchase of equipment for the canteen, had left the association with a net loss of $9,589 over this period. This was hardly offset by the gift shop and canteen, which produced an operating profit of a little more than $2,000. It is harder to isolate the cost of operating the Birthplace because the Association was using it as offices, and its accounts do not distinguish between historic-site and office expenses. But a rough guess, based on the TRA's financial statements, would be that historic-site expenses accounted for at least $15,000 to $18,000 of the house's total expenses of about $36,500. Early in 1961, the house's curator told Thomas Pitkin, an NPS official, that the house's budget had been "approximately $50,000 a year," but that the association was now trying to run it on about half that. Pitkin told his superiors to think in terms of the higher number, "to play safe."[114] On the income side, the picture was just as bleak. In 1961, income from admissions was running a little less than $1,700 per year. Even if one included all of the contributions received by the

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[110] Gable, "The Sagamore Hill Committee and the Prologue of the Past."

[111] Straus, "Theodore Roosevelt Association – Where Are We Going?"

[112] "Theodore Roosevelt Association Revised Budget 1960-61," bound in TRA Minutes 1961-75.

[113] TRA Executive Committee Minutes, November 30, 1960.

[114] Memorandum, Pitkin to Lee, January 30, 1961; NARA -Philadelphia, Box 6, NPS Northeast Office Administrative Correspondence 1953-68, Folder: Sagamore Hill 10/53-8/61. The comment about playing it safe is contained in a handwritten postscript.

association, and all of its membership income, and all of the royalties on its books as income attributable to the Birthplace – a very favorable interpretation – the house was still bringing in hardly more than $7,000 over an eight-month period.[115] Hagedorn's diagnosis was right: without a broader base of public support, the financial burden of operating Sagamore Hill and the Birthplace would eventually become unbearable.

With the Theodore Roosevelt Association bleeding money through its historic sites, it is no surprise that the trustees sought to give them to the National Park Service. Relinquishing the houses was not an easy decision. At the end of 1960, the TRA trustees discussed the matter one more time, and it was only after Straus reminded them that "the Executive Committee had more-or-less agreed that it [NPS acquisition] would be the only recourse for the Association to protect the future of the properties," that the committee authorized him to continue negotiating.[116] At this point it followed logically that the donation would have to include both houses, for giving away only one would merely postpone the association's collapse. What is more, it would place it in a potentially embarrassing situation, for it would be forced at some point to sell the Birthplace, a step it feared would provoke a "national uproar."[117] The TRA thus held firm to its initial proposal of a "package deal."

THE DONATION IN SUMMARY

Given its financial troubles, one might think that the Theodore Roosevelt Association had been negotiating from a position of weakness. Yet it did remarkably well. It not only shed the Birthplace, but also reduced its financial contribution from the near 90 percent level first proposed to just under 42 percent of an endowment that had grown substantially. It was doing well in other areas, too, netting $40,000 from selling part of the estate, and shedding its salary and pension obligations to its two senior employees. It may be that, as negotiations proceeded, the TRA became more hopeful

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[115] "Theodore Roosevelt Association Financial Report for eight months ended May 31, 1961," June 9, 1961; NARA-Philadelphia, Administrative Correspondence 1953-1968, Box 6, Folder: Sagamore Hill 10/53-8/61. The association had only begun to charge admission to the Birthplace in February, so in calculating the house's income, I have extrapolated from the monthly average. For further insight into the TRA's financial condition in 1961, and the cost of running the houses, see various financial reports and budgets, 1959-61; NARA - Philadelphia, Box 6, Administrative Correspondence 1953-68, SH 10/53-8/61.

[116] TRA Executive Committee Minutes, November 30, 1960. Straus does not say, according to the minutes, whether the discussions were held by him or by others, but the implication is that they were held by him.

[117] TRA Executive Committee Minutes, November 30, 1960.

about its own future. Early in the 1940s, Hagedorn had asked the trustees to consider the possibility that the association's work was done and that the organization should fold. That was more or less what Straus had in mind at the end of 1960, when he told the trustees he had promised Conrad Wirth to donate all of the TRA's properties with the exception of a "small endowment held back by the Association in order to make certain that the Association could be kept together in some working form."[118] One can only surmise when the TRA's attitude began to change. That it had changed was clear by mid-summer, when Oscar Straus told the trustees that "...the proposed bill, and the retention of some $700,000 should enable the Association and its Executive Committee to give advice and assistance to the National Park Service in administering Sagamore Hill and Roosevelt House, and to continue and strengthen its educational programs, both at Oyster Bay and New York City."[119] In the end, the TRA negotiated a settlement that would handsomely ensure not merely its survival but its future prosperity.

Could the National Park Service have driven a harder bargain? Probably. The agency may not have realized how strong its own hand was. Nor can the possibility be dismissed that the TRA's network of influence made it more difficult for the agency to take a firm negotiating line. None of this proves that the deal was a bad one from the perspective of the NPS: Sagamore Hill was a treasure. The fact was, both sides had much to gain from a successful negotiation.

Be that as it may, others in the Roosevelt orbit, with financial troubles of their own, soon began to see the Park Service as a potential savior. The Young's Memorial Cemetery in Cove Neck, containing Roosevelt's grave, was "experiencing difficulty with funds"; so was the adjacent Young's Memorial Sanctuary, a "research tract for ornithologists...of great interest and inestimable value."[120] Early in 1964 the National Park Service received coordinated requests for valuation from the Audubon Society and from the cemetery board, whose president, P. James Roosevelt, would soon take over the leadership of the TRA. The NPS declined them both.[121]

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[118] TRA Executive Committee Minutes, January 9, 1961.

[119] Oscar Straus, "Memorandum for the Trustees of the Theodore Roosevelt Association," July 26, 1961; SAHI Archives, TRA Papers, Folder H15: Legislative Histories.

[120] Memorandum, Park Planner Richard P. Wittpenn to Regional Director, April 20, 1964 [NARA-Philadelphia, Box 6, NPS Northeast Office Administrative Correspondence 1953-68, Folder: Sagamore Hill 9/61-4/64].

[121] Memorandum, Wittpenn to Regional Director, April 20, 1964.

THE ASSOCIATION'S LEGACY AT SAGAMORE HILL

On July 8, 1963, Sagamore Hill and the Theodore Roosevelt Birthplace formally changed hands. The day started with a morning ceremony at the Birthplace. Oscar Straus introduced the former president of the Women's Roosevelt Memorial Association, who described the house's restoration, then presented the deed to Secretary Udall, who addressed the audience. Following luncheon at the Birthplace, limousines conveyed the dignitaries to Sagamore Hill, where a similar ceremony took place. This time Straus handed over a $500,000 check for the endowment. And Secretary Udall spoke about the administration's environmental program.[122]

The acquisition process had gone remarkably smoothly. Yet much had been accomplished, and much had been set in place for the future. In taking over Sagamore Hill, the National Park Service inherited the legacy of a decade of TRA management. The agency also made important decisions in the course of acquiring the property. Both would continue to reverberate through the park's history for many decades. We would do well to pause on that summer day and take stock of the legacy that had been set in place. The Theodore Roosevelt House

Opening Sagamore Hill to the public had required quite a lot of work. Writing in 1953, Hagedorn estimated the total RMA/TRA investment in Sagamore Hill, including purchase, restoration, and protection, at "upwards of $300,000."[123] This included putting on a new fireproof roof, repainting the exterior, redecorating the interior "in appropriate fashion," installing modern heating and electrical systems, building a new stairway to the third floor, and installing museum exhibits in the maids' rooms.[124] All of

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[122] A program for the ceremonies exists in typescript; NARA II - College Park, NPS Records, Box 80: NPS Property Mgmt. & General Services L58 - NY Pt.1 - L58 Oregon: Administration Files, Folder: Pt. 3 NY 1/1/63-6/30/63. A copy of the deed for Sagamore Hill, dated July 8, 1963, is in SAHI Archives, TRA Records, Box 1, Folder 8.

[123] Hagedorn, *Guide,* p. 72.

[124] A concise list of major TRA alterations and repairs is provided in the *Historic Structures Report* (*HSR*) of 1964. The list includes repainting of exterior; replacement of deteriorated wood shingle roof with asbestos shingles and installation of concealed lightning-protection system; insulation of area over Trophy Room ceiling and wall against main house; replastering and rewiring of portions of exterior walls and ceilings of several attic rooms; installation of fire-detection and protection system, with 100,000-gallon underground storage reservoir; installation of staff toilets in basement; alteration of Ice House to accommodate public toilets; enclosing of kitchen service porch to provide staff kitchen; adaptation of old servants' living-dining room as curatorial office; installation of electric-eye burglar alarm system; removal of dumbwaiter (Norman M. Souder. *Historic Structures Report, Part II, Architectural Data Section on Sagamore Hill*, August 1964, pp. 2-3; SAHI: CRBIB, Box No. 8. The TRA also removed the section of the piazza added by Roosevelt about 1905, and rebuilt the balustrade that he had removed; Marie L. Carden, with Richard C. Crisson, *Sagamore Hill, Home of Theodore*

this and more was carried out under the supervision of New York architects Chapman, Evans & Delahanty.

Much of the TRA's work addressed issues of basic safety and comfort. The association installed new hydrants, sprinklers, and a 100,000-gallon underground reservoir fed by wells, as well as a new forced-air heating system. The association was also eager to present Sagamore Hill's rooms in a state as close as possible to their appearance during Roosevelt's life, and this required some refurnishing. Unfortunately, there were few historic photographs above the first floor. But in 1948, after Mrs. Roosevelt's death, the Roosevelt Memorial Association photographed the house as it then was, and a committee under Bertha Rose's leadership set to work. Mrs. Rose was not only a key figure in the RMA and a long-time friend of Mrs. Roosevelt, but also an expert in historic furnishings who brought long experience with the Metropolitan Museum's American Wing, the Winterthur Museum, the New-York Historical Society, and Raynham Hall.[125] At Sagamore Hill, she drew on the memories of Ethel Roosevelt Derby, Archibald Roosevelt, and Alice Roosevelt Longworth (Fig. 6).

On the top floor, however, instead of period rooms, the RMA turned three rooms into museum exhibitions on Roosevelt's family and children. To get visitors there, they also inserted a new stairway from the main second floor hall; widened, reversed, and gave the back stairs a gentler pitch; and widened the top floor hallway. These changes triggered others: carving space out of the room that would come to be known as the schoolroom, eliminating closets and a W.C., and altering the size and shape of two servants' bedrooms (Fig. 7).

Congressman Rutherford of Texas thought the RMA/TRA had done a "magnificent job" in preserving the house and its contents.[126] The service's professional staff was also approving: the house had been "thoroughly renovated," said the 1961 "Area Investigation Report," yet "no damage was done to its historical integrity." This view was echoed in official assessments ranging from the 1963 *Master Plan* to the 1975 *Historic Resources Management Plan*[127] and beyond. Not surprisingly, however, as the

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Roosevelt: Historic Structure Report (Boston, MA: National Park Service, North Atlantic Region, Cultural Resources Center, Building Conservation Branch, 1988/published 1997), p. 60.

[125] See, for example, TRA Executive Committee minutes, September 25, 1982. Information also provided by John Gable in telephone call to author, August 2004.

[126] *Congressional Record*: House Debate on H.R. 8484, April 2, 1962.

[127] Coryell, Failor, and Shedd, "Area Investigation Report," p. 9. Also *Master Plan*, Vol. I, chap. 1, p. 4 (approved chapter: version in Northeast Region Museum Services Center, Charlestown, MA [NMSC]). The 1975 *Historic Resources Management Plan* says: "thoroughly rehabilitated with due consideration given to its historic integrity": J. Brown, J. DeMarce, and P. Steele, *Historic Resources Management Plan*, *Sagamore Hill* (U.S. DOI, NPS, December 1975), p. 25; SAHI: CRBIB, Box No. 1.

National Park Service settled in, and as professional standards evolved, assessments became somewhat more critical. Calling for a historic structures report in 1987, NPS staff wrote that the house had been "improperly 'rehabilitated' and extensively altered"; it was no longer in accord with current standards.[128] This was atypically harsh. But by then, certain aspects of the association's work had come to present problems for park managers.

One was the redesign of the upstairs hallways and stairs. The "Area Investigation Report" found the TRA's interventions "not objectionable,"[129] and later studies would generally accept them. But the National Park Service would seek to mitigate or partially reverse them as opportunities arose. One came almost immediately, with the opening of Old Orchard as a museum. This allowed the Park Service to remove the upstairs exhibits from the Theodore Roosevelt House and refurnish the schoolroom and the two maids' rooms as period rooms.[130] The TRA was enthusiastically supportive. At the same time, the two maid's rooms were restored to their original shape. The central elements of the association's traffic scheme, however – the new stairway and the main leg of the reconfigured hallway – remained. Though serviceable to the public, they were not entirely without problems.

Cracking of plaster during the 1970s was traced to the impact of traffic on the third-floor stairway, which was unsupported from below; this has continued to cause sagging in the second-floor ceilings. In 1989, the *Historic Furnishings Report* would recommend mitigating some of the association's hallway interventions.[131] However, so decisively had the configuration of the upstairs hall been altered that it was decided not to restore its original wall treatments.

See also the 1964 *HSR* by Souder, which states that "Repairs and the addition of facilities necessary for the operation of the building as a museum have been handled well." Later assessments, however, were not always so positive. Justifying a request for preparation of a historic structure report in 1984, Superintendent Loretta Schmidt noted that "A major house restoration began in 1979 to correct and undo many changes made by the 1950's interior 'rehabilitation' conducted by the Roosevelt Memorial Association prior to the opening of the historic house...."; *Resource Management Plan*, FY 87, attached "Development/Study Package Proposal: SAHI: CRBIB Box #1.

[128] Development/Study Package Proposal for Historic Structure Report, August 27, 1987; NMSC, CRBIB File: SAHI – Prepare HSR.

[129] Coryell, Failor, and Shedd, "Area Investigation Report," pp. 9, 25. Detailed information on the changes can be found in David H. Wallace, *Historic Furnishings Report [HFR], Sagamore Hill – Volume 1: Historical Data* and *Volume 2: Furnishing Plan* (Harpers Ferry, WV: U.S. DOI, NPS, Harpers Ferry Center, 1989 and 1991, respectively), Vol. 1, pp. 61, 85-86, and Vol. 2, *passim*.

[130] For the Old Orchard negotiations, early museum planning, and the restoration of 1966, see Chapter 2.

[131] Wallace, *Historic Furnishings Report,* Vol. 1, p. 86, and Vol. 2, p. 167.

As for the furnishings of the period rooms, the *Historic Furnishings Report* of 1989 described the TRA's work with approval as a "nearly complete refurbishing of the house that captured the spirit and, particularly downstairs, pretty accurately reflected the details of Sagamore Hill's highly individual appearance in the first two decades of the 20th century."[132] But the *Historic Furnishings Report* sought a higher degree of accuracy.[133] And a few years later, park staff would criticize the association's restoration work as "based on a committee's interpretation of 'Victorian Design' and not on a study of how the rooms were actually finished and furnished when the Roosevelts lived in the house."[134] This was unfair: the statement reflected the standards of a later era, which could not have been formulated, much less attained, had the association not worked so hard for historical accuracy 40 years earlier. Matters of judgment aside, the *HFR* did comment on another dimension of the NPS's inheritance: "very incomplete" records concerning the TRA's refurnishing, particularly above the ground floor, which left the experts in doubt as to whether certain pieces were original or not.[135]

The TRA's infrastructure investments left a mixed legacy. Its "state-of-the-art" fire-suppression system[136] fortunately never had to be tested in action, and it survived for 40 years or so. The heating system was quite another story. It passed muster with the authors of the "Area Investigation Report," but by 1970 was noted as the cause of loose window sashes, cracking plaster and paneling, shrinking woodwork, shifting stairways, and loose flooring. By 1974, plaster was pulling away from lath, and wallpaper was peeling. In 1975, wood furniture was cracking, glued joints were opening, and leather book bindings were deteriorating. The culprit was excessive winter heat and dryness,

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[132] Wallace, *Historic Furnishings Report,* Vol. 1, p. 35. For the RMA's photographs of 1948, see p. 3. The *HFR* documents contain detailed documentation of the changes introduced during the TRA's refurnishing: see pp. 35 ff. and *passim*. For the interior refurnishing, see also Mrs. Reginald P. Rose, "The Sagamore Story," in "Sagamore Hill" (NPS brochure, n.d., at SAHI - Interpretation Files, Folder: Educational Materials).

[133] See, for example, the discussion of the second floor hall and stairs in *HFR*, Vol. 2, p. 91.

[134] Project Directive: One Year Program, "Install Historic Finishes in Eleven Rooms in the Roosevelt Home," prepared by R. Johnson and A. Verone, August 26, 1996; SAHI: Central Files, D 2621.

[135] Wallace, *Historic Furnishings Report*, Vol. 2, p. 9.

[136] Chief of Visitor Services and Chief of Museum Services, Sagamore Hill National Historic Site, *Resource Management Plan, Sagamore Hill National Historic Site* [draft] (U.S. DOI, NPS, 1992), p. 13; SAHI: CRBIB Box No. 1.

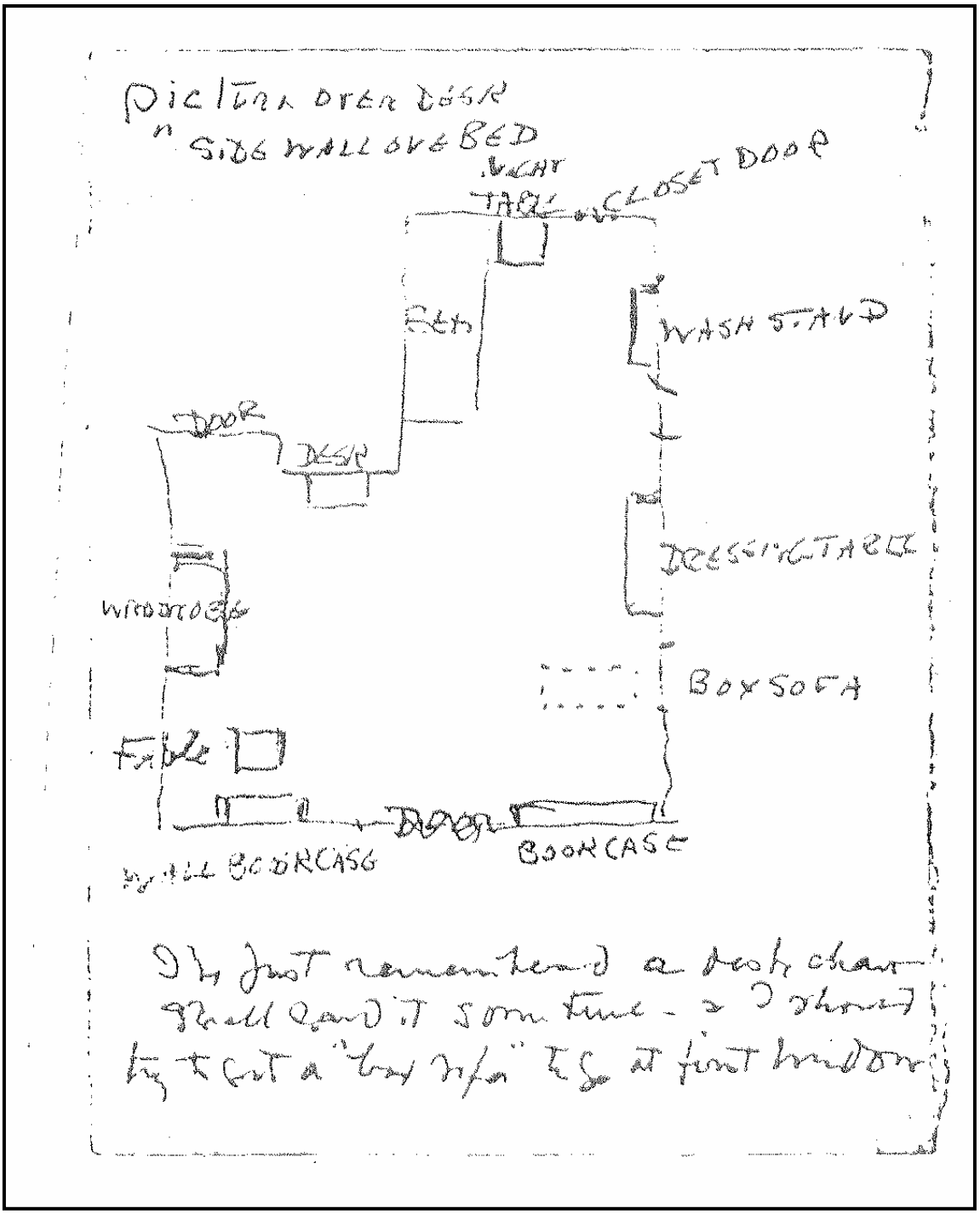
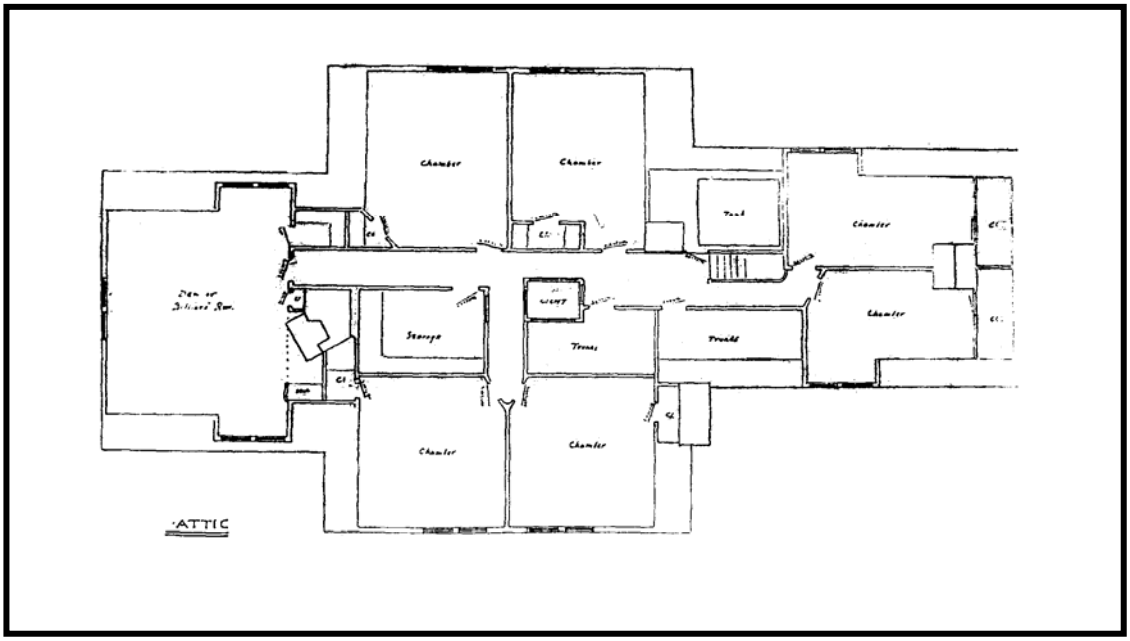


Fig. 6. Alice Roosevelt Longworth's sketch of her old bedroom, made about 1955, when she donated the furnishings with which to restore it. (Courtesy Sagamore Hill NHS.)



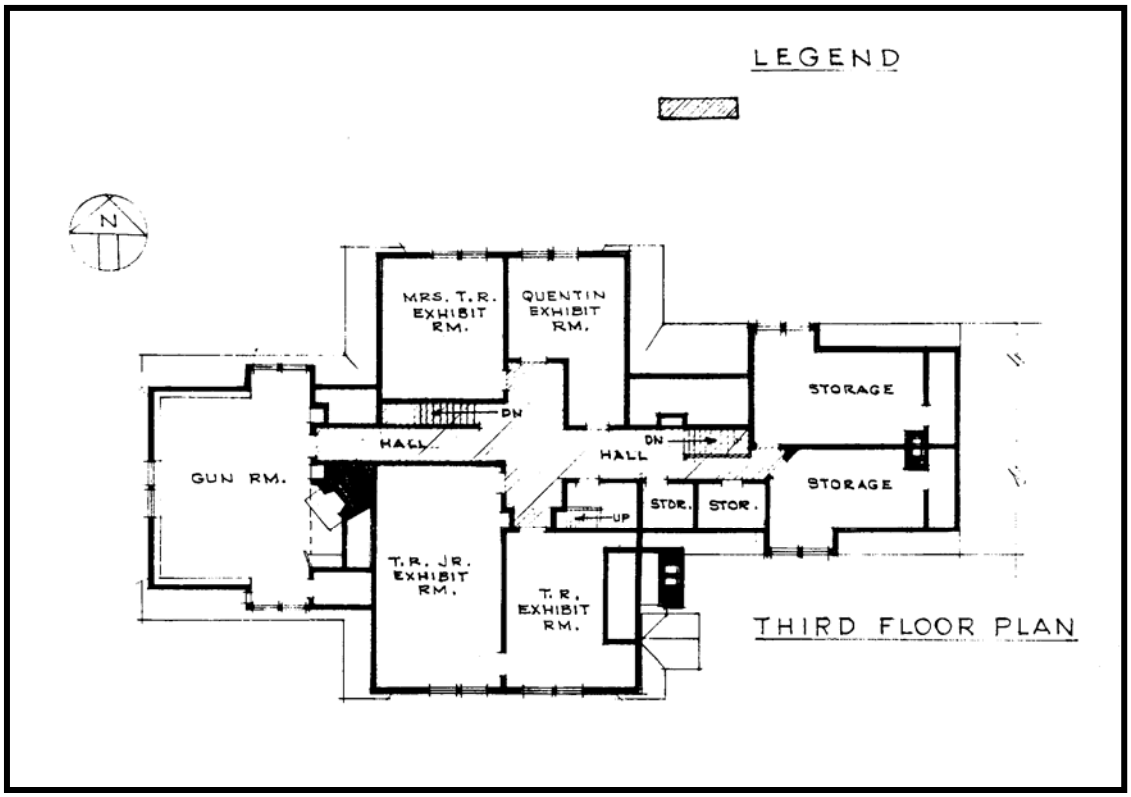


Fig. 7. Plans of third or attic floor of Theodore Roosevelt House: *top*, as originally built (Lamb and Rich, 1883); *above*, as it existed in 1963 following alterations made by the Theodore Roosevelt Association. (From Norman M. Souder, *Historic Structures Report, Part II (Portion), Architectural Data Section on Sagamore Hill: Restoration of Porch, Stabilization of Staircase, Masonry Pointing and Painting*, Eastern Office, Design and Construction, Division of Architecture, August 1964.)

and despite repeated studies and efforts to correct the problem, it has continued to the present day.[137]

The Grounds

If all initially seemed pretty nearly right in the house, the landscape was more problematic. The land purchases and boundary adjustments carried out between 1961 and 1963 assured the protection of the estate's core, and further adjustments would be pursued during the 1980s. But the change from family house to historic site had transformed the grounds (Figs. 8, 9). Visitors no longer climbed the spine of the hill and landed at the porte-cochere – as Roosevelt's guests had done – but swung around the base of the hill on a new access road that led to a three-acre parking lot on the site of flower and vegetable gardens that Archibald Roosevelt called "the pride of both my father and mother."[138] A snack bar and gift shop straddled the pathway from the parking lot to the house. Where the Stable and Lodge had once stood were gardens, a hedge, and an open lawn. As the NPS's *Cultural Landscape Report* put it much later, "The core no longer consisted of the house lot, working farm, garden, and orchard, but rather the house lot, souvenir shop (and picnic area), new garden, and parking lot." A "series of demolitions and additions" had "altered the site's character from that of a working farm to a well groomed park."[139]

Some changes, of course, had been inevitable if the Theodore Roosevelt Association intended to open the estate to the public. The association knew perfectly well that they would affect the property's historic character – at a meeting in 1949, one trustee hoped that "parking space might be kept modest and informal to forestall the danger of its changing serious the character of the environs of the house"[140] – and they

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[137] For conservation problems caused by heat and dryness, see Architect Norman M. Souder to Thomas Crellin, Chief of History & Historic Architecture WSC, April 3, 1970; NPS Library, Washington, D.C. Also Restoration Specialist Bobby Flickinger to Park Manager, March 26, 1971; NPS Library. Also Merrill J. Mattes, Manager, Historic Preservation Team, Denver Service Center, to Assistant Director, Park Historic Preservation, WASO, December 5, 1974; NPS Library, File Correspondence 1973-74. Also J.J. Brown, J. DeMarce, and P. Steele, *Historic Resources Management Plan*, p. 46.

[138] Letter, Archibald Roosevelt to Conrad Wirth, May 16, 1961; NARA - Philadelphia: NPS Northeast Office Administrative Correspondence 1953-68, Box 6, Folder Sagamore Hill 10/53-8/61.

[139] Regina Bellavia and George W. Curry, *Cultural Landscape Report for Sagamore Hill National Historic Site, vol. 1: Site History, Existing Conditions, and Analysis* (Boston, MA: NPS, Northeast Region, Olmsted Center for Landscape Preservation, July 1995), p. 150. Also, Bellavia and David L. Uschold, *Cultural Landscape Report for Sagamore Hill National Historic Site, vol. 2: Treatment Recommendations and Implementation Plan* (Boston, MA: NPS, Olmsted Center for Landscape Preservation, March 1998), p. 1.

[140] General McCoy: TRA Executive Committee Minutes, March 16, 1949.

studied their intervention with care. Nevertheless, the results met with criticism. Archibald Roosevelt, who praised the association's work inside the house, wrote to Director Wirth in 1963 that "Whoever did the landscaping when the house came into the Theodore Roosevelt Memorial Association certainly made a botch of it so far as reproducing landscaping of the period of the early 1900's and late 90's is concerned." Roosevelt thought that correcting the problems would require "a major piece of as we shall see, was inclined to agree. While the "Area Investigation Report" concluded that landscaping,"[141] and the Park Service, the site presented "no immediate problems," it advised that the TRA's parking lot, canteen, and souvenir shop would have to be relocated if (as the authors recommended) the NPS goal was to "keep the grounds and surroundings as much as possible the way they were during Theodore Roosevelt's life."[142] This goal, together with the report's proposed alterations, received further support from the *Master Plan* prepared (but never officially approved) in 1963.[143] Plans for a new access road, parking lot, and visitor reception center were proposed. But in 2004, the TRA-built access drive, parking lot, and concession stand continue to greet visitors (although the latter has been converted into a modest visitor center). As this study is being completed, work is underway on a new general management plan that will, when approved, will be the park's first such fully approved plan. It will once again take up the question of how to handle the landscape features introduced by the TRA.

The Story

The Theodore Roosevelt Association's left a legacy of convictions about what Sagamore Hill meant. At the first meeting of the Theodore Roosevelt Permanent National Memorial Committee in 1919, Charles E. Hughes particularly liked the idea of preserving Sagamore Hill because he thought "there should be constantly impressed upon the succeeding generations of America, the habit of thought and the ideals of that man as he actually was and walked among us...." He and others wanted Sagamore Hill to do for Roosevelt what Mt Vernon had done for Washington. Words like "sanctuary" and "pilgrimage," used frequently in the early debate over Sagamore Hill, suggest a reverential mood. But Hughes's thought was more precise and more complex. Sagamore Hill would connect visitors to Roosevelt the person and, through his warmth

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[141] Letter, Archibald Roosevelt to Wirth, August 26, 1963; NPS Library, File Correspondence 1963-72].

[142] Coryell, Failor, and Shedd, "Area Investigation Report," pp. 18, 32.

[143] For the Master Plan's history, see the subsequent discussion on pp. 83 ff.

and humanity, lead them to the lofty and less approachable ideals of Roosevelt the great man.

The TRA retained powerful and direct links to the original Memorial Committee of 1919 until quite late: Hermann Hagedorn, who had served as the committee's secretary, served as the association's executive director until 1957. "We saw Sagamore Hill," he remarked in his farewell to the executive committee, "as a priceless new national shrine that would awaken in thousands and, ultimately, in millions, not only a perception of Theodore Roosevelt's qualities as a man and a citizen, but an appreciation of his message to America today and in all the tomorrows...."[144] He was saying almost exactly what Charles Hughes had said almost 40 years earlier. So it is not surprising that the TRA generally passed this view on to the National Park Service. Why the NPS maintained it so faithfully is another question. Probably it did not differ radically from the agency's own approach to presidential sites at that time. But the association's continuing influence would also be a factor. In 1991, the Park Service proposed to move Philip de Laszlo's well-known portraits of President and Mrs. Roosevelt from their accustomed (but not original) places. That of the President was a copy, and was not brought to Sagamore Hill until after his death. Thus, as part of a plan to bring the entire house back to a more original condition, it was to be removed from view. John Gable, then executive director of the TRA, objected: "The public needs to see pictures of Mr. & Mrs. Roosevelt in their house. This is basic to the experience of visiting the house." Gable himself had noted in his college application that he had "adopted Roosevelt as 'a kind of hero-patron saint.'"[145] For the association – and quite often for the Park Service – Roosevelt the man would remain the focus of interpretation. And Roosevelt the great man would always be somewhere in the room.

The TRA's interpretive legacy was more complex than this. Other strands were not so much accepted without question as argued and debated – even within the association. A trustee worried in 1951 that "government-owned and operated shrines were generally 'dead things', material structures merely, without vitality or spirit." He wanted Sagamore Hill to be a "center of dynamic activity for the propagation of Theodore Roosevelt's ideas and ideals."[146] This idea, of a memorial as an active force, not merely for remembering but for keeping Roosevelt's ideas alive, was essentially what Gifford Pinchot had proposed in 1919, and it remained part of the TRA's thinking. Hermann

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[144] TRA Executive Committee Minutes, February 28, 1957.

[145] Letter, John Gable to Superintendent Martinez, November 18, 1991; SAHI: Curatorial Files, Folder: Refurnishing Project]. Also, Ann Starr, "The President's Man (*Kenyon College Alumni Bulletin*, summer 2004), p. 45.

[146] The speaker was Mr. Chadbourne: TRA Executive Minutes, January 2, 1951.

Hagedorn was entirely faithful to it when, in 1941 and again in 1954, he proposed transforming the Birthplace from a "personal memorial and historic shrine" into a national center for cultivating the American spirit. Such a center would be anything but dead: it would be "vital," in fact. The association's statement of purpose for Sagamore Hill proclaimed a similar ideal: a place that would be a "rallying-point and dynamic center," while also being a "shrine in the deepest sense of the word."[147] But the fact was, the shrine idea and the dynamic-center idea were contradictory. From a vital-center point of view, any shrine – government-operated or not – might appear somewhat lifeless. Conversely, advocates of the shrine idea were prone to reject almost any vital-center initiative as undignified. And so the debate continued. But in practice, the shrine idea consistently prevailed. Hagedorn's vital-center proposals went nowhere. And long after the transfer, the TRA would dash NPS efforts to make the Birthplace a vital center for environmental education, because it would detract from its quality as a shrine.

Another strand in the TRA's interpretation did not date to the association's founding, but reflected the particular circumstances of the period following World War II. "The purpose" of acquiring Sagamore Hill, announced the association in 1949, was "to establish it as a national shrine that shall dramatize the highest traditions of American family life." This emphasis may seem surprising, given the TRA's long-standing dedication to Theodore Roosevelt as an outstanding individual. The statement continued: "At this time, when the American home is being subjected to unprecedented strains, the Trustees seek to call attention anew to a home that for a generation was acclaimed everywhere as a model of what an American home should be, in loyalty, affection, discipline, unsullied integrity and sacrificial devotion to the national welfare." The statement does little to reveal the deeply ideological position behind the association's emphasis on family, but the emphasis on "loyalty" and "sacrificial devotion to the national welfare" among the virtues it listed is suggestive. President Truman had begun by 1947 to hunt and remove officials with Communist ties from his administration. The House Un-American Activities Committee was in full swing, and Joseph McCarthy – who had entered the U.S. Senate as a Republican in 1946 – would launch his infamous anti-Communist hearings just eight months after the association's statement. Roosevelt's son Archibald held strong anti-Communist sentiments; his grandson Kermit was a Central Intelligence Agency operative and would soon mastermind the coup overthrowing Iran's Communist-supported (but democratically elected) Prime Minister, Muhammad Mossadeq. Sagamore Hill's domestic idyll was designed to attack the menace of Communist subversion in subtler ways. The TRA's

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[147] "Statement of Purpose of the Roosevelt Memorial Association," 1951; see Appendix A.

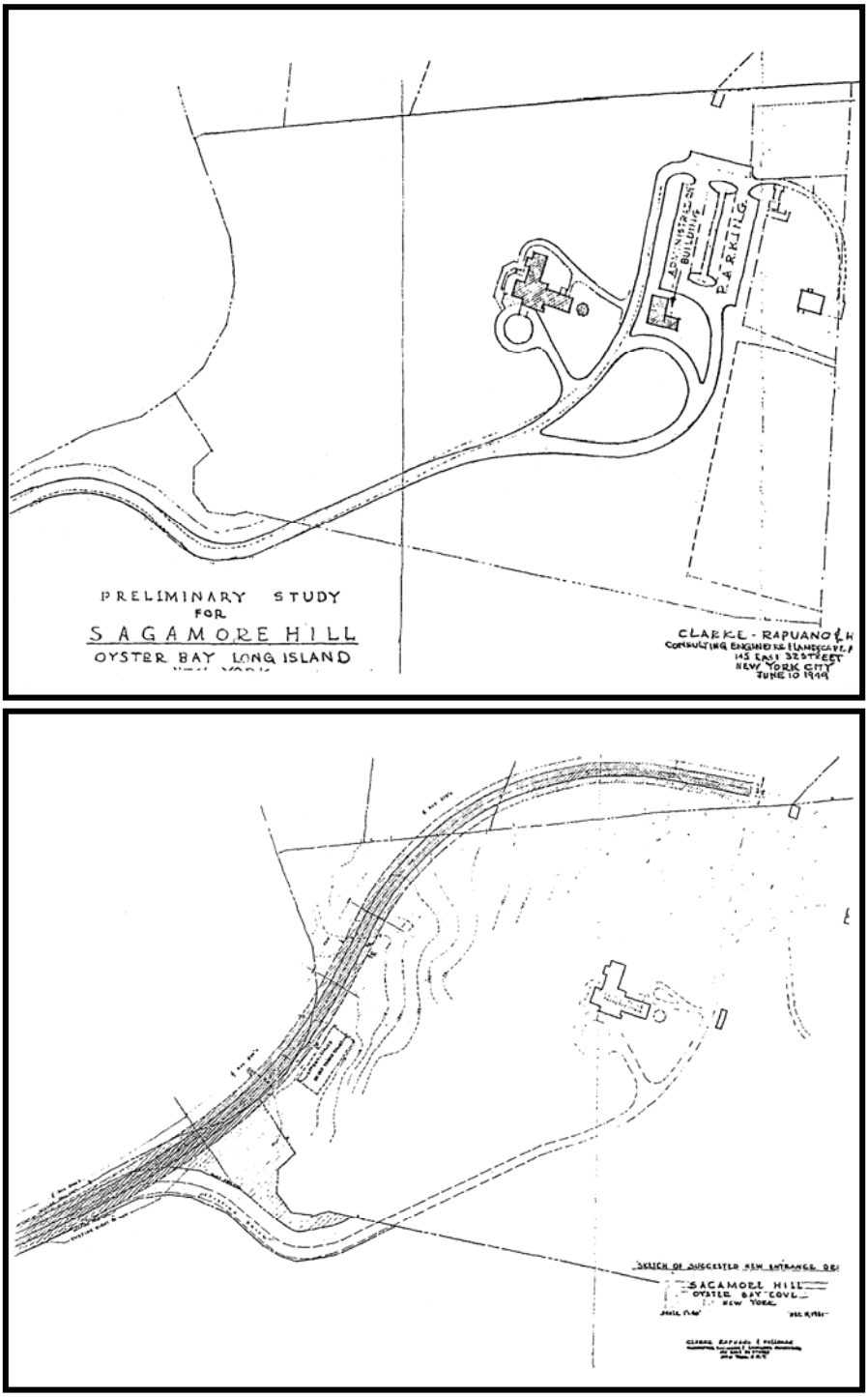

Fig. 8. Peliminary design for a new access by landscape architects Clarke and Rapuano in 1949. Top plan shows an alignment cutting across the corner of John K. Roosevelt's property and generally following the course of the original drive. A 1951 sketch, above, shows the solution actually adopted – an alignment swinging around the other side of the house. The existing drive is shown at right. (Courtesy Sagamore Hill NHS.)

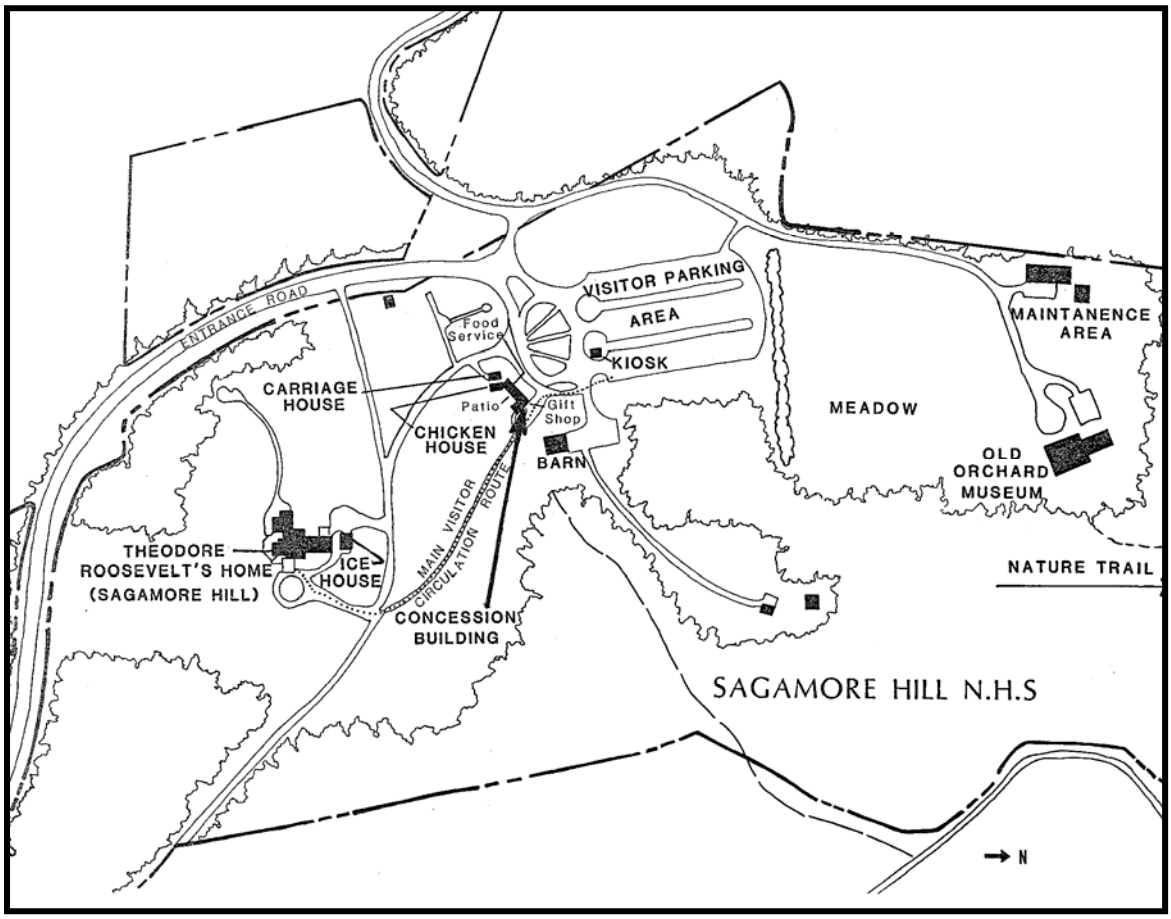

Fig. 9. The core of the estate as it existed in 1983. The entrance road, visitor parking area, concession building, and patio (with food service and gift shop) are TRA interventions; the kiosk is a later NPS addition. (Courtesy Sagamore Hill NHS.)

statement went on to link it explicitly to the virtues of patriotism, and even to the continued existence of the United States. The trustees believed, too, that exposure to the Roosevelt family's domestic life would "raise queries" in the minds of visitors "about their own homes, wake uneasy thoughts of neglected opportunities, even crystallize new resolves."[148]

While the planning documents associated with the NPS acquisition of Sagamore Hill give no hint of any position one way or the other on the Communist threat, the agency did inherit and perpetuate the TRA's absorption with the image of the family. New exhibits installed at Old Orchard in 1966 placed great emphasis on Roosevelt's family life and offspring. More than 20 years later, collections policies continued to reflect this TRA-inspired inheritance. It made an odd counterpoint, never entirely resolved, to the presentation of Sagamore Hill as a shrine to individual greatness.

The Theodore Roosevelt Association

What made it possible for the Theodore Roosevelt Association to exercise this kind of influence was another part of the legacy that the National Park Service inherited in the summer of 1963: a long, close, and many-layered relationship with the association itself.

From its earliest letter to Conrad Wirth, the TRA had made clear that it expected to play an important role in Sagamore Hill's future. "In the event that Congress should approve such a gift," Straus wrote to Director Wirth on December 6, 1960, "we would like to obtain some assurance that our active Sagamore Hill Committee, made up of distinguished citizens resident in Oyster Bay, New York, could become an Advisory Committee regarding the future operation of Sagamore Hill."[149] This was the only condition he requested. At executive committee meetings, Horace Albright assured trustees fearful of being ignored that the NPS would consider their views, and he pointed to places where the Park Service was working closely with citizen groups.[150] In this spirit, early drafts of H.R. 8484 called for the association, or its executive committee, to "serve in an advisory capacity to the Secretary of the Interior in matters relating to their preservation"[151] (i.e., that of the two sites). Ronald Lee may have crafted this wording;

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[148] "Memorandum Prepared by the Trustees of the Roosevelt Memorial Association in Connection with the Proposal to Purchase Sagamore Hill and to Establish it as a National Shrine," June 15, 1949; see Appendix A.

[149] Letter, Straus to Wirth, December 6, 1960.

[150] See, for example, TRA Executive Committee Minutes, January 9, 1961.

[151] Draft of bill attached to letter, Wirth to Straus, June 14, 1961.

he certainly approved of it.[152] But the Interior committee of Congress limited the government's obligation to consult the TRA to the question of establishing an advisory committee. What happened next suggests that Lee was unwilling to give up his more expansive view of the association's role. While the first draft of the park's *Master Plan* (May 1963) incorporated the language of the enabling legislation, a later version reverted to the rejected text, delineating a consultative relationship unlimited in time and extending over the entire scope of "matters relating to the preservation, development and management" of the park.[153] In August, Lee signed off on this wording.

Meanwhile, the government was doing what Congress had directed it to do: consulting with the TRA regarding the establishment of an advisory committee. Lee handled these negotiations. Immediately after Congress approved the donation, he assured the association that Secretary Udall "would appreciate having some suggestions" about its membership.[154] During the next few months Lee sent suggestions and recommendations alternatively to Straus and Wirth, who passed them up to Udall. Things went forward pretty much according to Lee's plan, which was for Straus to submit a list of nominees upon receipt of a letter from Secretary Udall.[155] Finally, Udall would appoint them to the committee. In July 1963, accordingly, he appointed "11 persons, all active in the TRA."[156] They were the 11 trustees recommended by Lee, who had drawn their names from the 20 put forward by Straus. Whether Congress intended

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[152] See Chapter 3 for a fuller discussion of Lee's role here.

[153] *Master Plan* [May draft], "Preservation and Use Objectives," p. 5; and September version, vol. I, chap. 1, p. 7 (approved chapter); both in NMSC. For the history of the *Master Plan* drafts, see Chapter 2.

[154] Memorandum of Meeting prepared by Oscar Straus and forwarded to Ronald Lee, August 29, 1962.

[155] Lee set forth his plans and recommendations in letter to Straus, September 17, 1962, and memorandum to Wirth, September 28, 1962; NARA - Philadelphia, Correspondence Files regarding Establishment of Park Service Sites at Sagamore Hill and Theodore Roosevelt's Birthplace, pp. 15 and 16 (digital copies at NRBPA–79–413–ROOSEVELT (A)]. Also June 14, 1963; NPS Library, Washington, D.C. The remainder of the appointment process can be tracked in letters, Udall to Straus, December 20, 1962; NARA - Philadelphia, Correspondence Files regarding Establishment of Park Service Sites at Sagamore Hill and Theodore Roosevelt's Birthplace, p. 32 (digital copies at NRBPA–79–413–ROOSEVELT(A). Also Straus to Udall, January 31, 1963; Udall to Straus, March 18 and July 3, 1963; and "Advisory Committee for Theodore Roosevelt Birthplace and Sagamore Hill National Historic Sites" (listing the original committee members), n.d. (1963); all NPS Library.

[156] Covering Brief, Director, NPS, to Secretary of the Interior, July [illeg], 1963; NARA II - College Park, Secretary of the Interior Classified Files 59-63, Box 335. The 11 original members were as follows: Chairman – Oscar Straus; Birthplace Subcommittee – Mrs. Sherman Post Haight, Oren Root, Lyman Tondel, Jr., William B. Nichols, and Julian Street; Sagamore Hill Subcommittee – Mrs. Reginald Rose, Mrs. Richard Derby, Elisha Dyer, Horace Albright, and Hermann Hagedorn. The same collection contains the letters of appointment and other related correspondence.

the advisory committee to be, in effect, an arm of the TRA may be doubted, but it was certainly what the association intended, and quite probably also what Lee had in mind. Another draft of the park's *Master Plan* called on the NPS to consult the "Advisory Committee *from the Theodore Roosevelt Memorial Association*" [italics added].[157]

There was a wrinkle. Udall proposed not two advisory committees, as recommended by Lee (one for each site), but a single committee with "two units, to function separately for the Birthplace and Sagamore Hill, but jointly on over-all matters pertaining to the two sites"; Udall referred to the units also as subcommittees.[158] This pleased Straus and the trustees. The TRA now proposed allowing subcommittee chairs to appoint members from outside the committee,[159] but Lee advised Conrad Wirth that the law did not allow this authority to be delegated. Now the full complexity of the advisory apparatus became apparent:

> I would suggest [wrote Lee] that Mr. Straus be advised that we hope that the Theodore Roosevelt Association will itself continue to keep in existence its own House Committees for the Birthplace and Sagamore hill, as in the past, to work with the Advisory Committee. Their Chairman should be identical with ours however.[160]

The point seemed to be that the advisory committee was a federal entity, not an arm of the TRA – even though its membership was entirely drawn from the association, and it had been designed explicitly to give the association's voice.[161] "This may sound a little cumbersome in the telling," Lee assured Wirth, "but I believe, in practice, it will work out all right."

Some 10 years later, the Federal Advisory Committee Act would seek to end this type of exclusive relationship between federal agencies and private groups. But in 1963 no one at Interior seems to have objected to it. It satisfied the technical requirement of a

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[157] *Master Plan,* SAHI version titled "Package Master Plan," p. 7; SAHI: CRBIB 010474. Internal evidence suggests that this version of the plan, though undated, almost certainly follows the version of May 1963, but precedes the approved text of June-September, 1963; both in NMSC. For the history of master plan drafts, see Chapter 2.

[158] Letter, Udall to Straus, December 20, 1962.

[159] Letter, Straus to Udall, January 31, 1963.

[160] Memorandum, Lee to Wirth, June 14, 1963.

[161] Lee emphasized the distinction in another memorandum to his Assistant Regional Directors: "We have stressed the desirability of the Theodore Roosevelt Memorial Association continuing its own House Committees to work with the Secretary's Advisory Committee when it is appointed, including working with the two Subcommittee Chairmen." June 27, 1963; NARA - Philadelphia, Box 9, entry 414, 1953-1964.

federally constituted entity, while achieving the policy goal of some staff within the National Park Service. Whether it met the intent of Congress is less clear.

The advisory committee was not the only force binding the Theodore Roosevelt Association and the National Park Service together. The Park Service had agreed to give the association free office space for its headquarters at the Birthplace, as well as use of a room at Old Orchard. And the NPS would retain the curators hired by the association in 1952-53, Helen MacLachlan at the Birthplace and Jessica Kraft at Sagamore Hill.[162] Both would serve until 1974. Meanwhile, they continued to work part-time for the TRA; Jessica Kraft also served as an officer of the association, and after leaving the NPS, even took on additional staff responsibilities for it.

And so the TRA remained a powerful force at Sagamore Hill. Its political contacts in Washington, its stature with the politicians and the press on Long Island, its tenacious interest in everything that happens at the park, its sheer presence there, have all combined to make it one of the most striking of the legacies the Park Service inherited in 1963. But perhaps the most important factor was the endowment, the $500,000 fund donated by the association. There was nothing in the documents concerning the transfer that gave anyone any reason to think that the TRA would have a role in deciding how the money was to be spent. And at first, they did not. Yet over time, the association began to exert direct and increasingly strong control over the funds. And if any single factor would ensure both that the Association would remain an important force at Sagamore Hill, and that the relationship would be at times difficult, that factor was the endowment. How that came to be is told in Chapters 3 and 5.

The Boone and Crockett Club

The National Park Service inherited another institutional relationship through the Theodore Roosevelt Association's stewardship. In 1951, the Boone and Crockett Club – of which Kermit Roosevelt was a member – had come to the RMA with an offer: they would renovate the Gun Room in exchange for permission to use it as the club's headquarters. The association agreed.[163] In 1962, the Department of the Interior assured the club it could continue using the Gun Room; a year later, this arrangement was written into the park's *Master Plan*.[164] The Boone and Crockett Club remained in

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[162] These agreements are summarized in letter, TRA President William B. Nichols to Lee, November 26, 1963 (contained in TRA Executive Committee Minutes).

[163] RMA Executive Committee Minutes, May 29, 1951, and February 18, 1952.

[164] Letter, Assistant Secretary of the Interior John A. Carver, Jr., to Robert M. Fergusson, President, Boone and Crockett Club, February 27, 1962; NARA II - College Park, NPS Records, Box 80: NPS Property Mgmt. & General Services L58 - NY Pt.1 - L58 Oregon: Administration Files, Folder: L58 Pt.

the room until about 1965, but its legacy lived on in the unfortunate form of a long-running and at times acrimonious dispute over the ownership of some of Theodore Roosevelt's guns, which is chronicled in Chapter 6.

The Birthplace: A Postscript

The same machinery that brought the two houses into the National Park system and forged an ongoing relationship with the Theodore Roosevelt Association also ensured that the Birthplace would continue to be a force in Sagamore Hill's history. Udall told Straus that the advisory committee's two subunits would function "jointly on over-all matters pertaining to the two sites," but that the two sites would be separately administered (the Birthplace under the superintendent of the New York City Group, Sagamore Hill under its own).[165] However, within five months of the dedication, the NPS had eliminated the position of superintendent at Sagamore Hill. In January 1964, the park was added to the New York City Group, along with the Birthplace. There it would remain, under various name changes and regional reorganizations, for the next 12 years.

As long as the TRA remained deeply interested in both houses, it would have been difficult to insulate one from the other. An example came in 1973, when conflict over the NPS's desire to establish an environmental education center at the Birthplace weakened the service's control over the endowment in ways that would affect Sagamore Hill right up to the present. Nor were any rules established during the early period to govern how funds were distributed between the two sites. That seems to have been because both parties assumed this would be left to the Park Service to decide internally. But when the TRA began to assert control over endowment spending, this became another instrument through which the Birthplace, and the association's priorities for it, affected Sagamore Hill. In 1989, more than $150,000 of endowment funds was spent on reroofing the Birthplace, a project of particular concern to the TRA. Three years later, the association's director informed Sagamore Hill that the park would have to continue waiting for endowment funds while the depleted reserves built up again, "said reserves having been spent on putting a new roof on Theodore Roosevelt Birthplace."[166] This will be discussed more fully in Chapter 5. The point here is simply that these issues, when they arose, were the consequence of decisions made in acquiring Sagamore Hill.

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1 NY 1/1/62-6/30/62]. Also *Master Plan*, September version, vol. I, chap. 1, p. 7 (this chapter of the plan was approved: see Chapter 2 of this report).

[165] Letter, Udall to Straus, December 20, 1962.

[166] TRA Sagamore Hill Committee Minutes, June 2, 1992; SAHI: Central Files, Folder: A 42.

As for the Birthplace, the reluctance of NPS staff to accept the house would prove well-founded. In conversation with this author, NPS Chief Historian Dwight Pitcaithley pointed out that, while admittedly lacking integrity as an original historic building, it is significant in the history of replicas. It is certainly a valid point. Yet questions about the house's value have persisted, as have management and financial problems. A decade after its acquisition, the house was attracting a meager 10,000-12,000 visitors per year.[167] In 1973 a museum consultant, asked to consider its future as a house museum, told the TRA that the Birthplace "had a very low potential at the moment...."[168] The association had just quashed a center for environmental education installed by the Park Service – just as it had defeated Hagedorn's "vital center" proposals of 1941 and 1954 – and very little else was happening at the house. By 1974, both the NPS and the TRA were conceding defeat in their hopes of revitalizing the place. The house remained open, nevertheless, soaking up federal money, including major allotments from the endowment given by the association. The city was pressed to contribute to devote resources to improving the building's setting. Now, more than 40 years after the transfer, the visitation figures have hardly risen. But the Birthplace's greatest drawback may have been its propensity to spark disagreements between the TRA and the NPS – disagreements that spilled onto Sagamore Hill.

As for the TRA, giving away the Birthplace brought some benefits, not least of all financial. Before the transfer, the association had been running frightening deficits. Afterwards, it had a new problem: too much money. Early in 1964, the association predicted a surplus of almost $7,000.[169] By 1972, with regular expenses totaling $10,000-15,000, annual income was running at $30,000, 92% of which came from investments. The explanation for this reversal is quite simple: though the TRA had given away more than 40 percent of its endowment, it had also shed some very large financial responsibilities. Those responsibilities considerably outweighed the lost income. On balance, then, the TRA had greatly improved its financial position through the donation. This should have been good news for the association. The problem was that the TRA was in danger of losing its tax-exempt status unless it started spending a substantially larger share of its remaining income on charitable purposes. So its trustees began authorizing additional grants – to Young's Memorial Cemetery and the Town Park in

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[167] TRA Executive Committee Minutes, May 26, 1973, and memorandum, P. James Roosevelt to Executive Committee, June 5, 1973 (in minutes).

[168] TRA Executive Committee, August 25, 1973. The consultant was Ed Schmidt of the Nassau County Museum.

[169] "Theodore Roosevelt Association. As of February 5, 1961" [financial statement], bound in TRA Minutes 1961-75.

Oyster Bay as well as to projects far a field. The TRA succeeded in keeping its tax-exempt status. It prospered, too: with operating income in 1978-79 running more than $58,000, and special contributions totaling almost $14,000, it still managed to end the year with a surplus of more than $7,000.[170]

[170] TRA Executive Committee Minutes, May 8, 1965; February 19, 1972; May 26, 1973. Also "TRA Projected Budget for Fiscal Year 1979-1980; Corrected to conform with changes," "TRA Fiscal 1979-80," "Report on Budget – 1980-81," and "Report on the TRA Budget, Fiscal 1981-1982," in TRA Minutes 1976-80 and 1981-84.

CHAPTER 2

PLANNING AND DEVELOPING SAGAMORE HILL

PREFACE: 1963

Sagamore Hill was formally established by proclamation of Interior Secretary Udall on Monday, July 15, 1963. But the National Park Service had started preparing to run the park almost a full year earlier. Within days of President Kennedy signing the authorizing legislation, Director Wirth had assigned Sagamore Hill to the Northeast Regional Office, led by Ronald Lee.[1] Straus and Lee were soon hard at work. Over luncheon with key Theodore Roosevelt Association trustees on August 28, they sketched a road map for the transfer. The mood was eager, and decisions came easily: that Straus would forward suggestions regarding the advisory committee to Secretary Udall; that inventories would be prepared of both houses; that the TRA would exercise its option to purchase Old Orchard; that the President would be invited to the dedication ceremony; and that the association would continue to operate the cafeteria and gift shop at Sagamore Hill until the beginning of 1964.[2]

All of these things were done, though President Kennedy ultimately declined the invitation to the ceremony.[3] There were other issues to resolve. An intricate series of land transactions did not significantly alter the park's acreage, but did shape its character

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[1] Letter, Conrad Wirth to Oscar Straus, July 31, 1962; NARA - Philadelphia, Correspondence Files regarding Establishment of Park Service Sites at Sagamore Hill and Theodore Roosevelt's Birthplace (digital copy: NRBPA-79-413-ROOSEVELT(A), No. 6.

[2] Participants in the meeting were: from the NPS – Regional Director Ronald F. Lee and (confusingly) Chief of Lands Division Donald E. Lee; and from the TRA – Straus, Vice President Elisha Dyer, and Bertha Rose, Chairman of the Sagamore Hill Committee. Oscar Straus, Memorandum of Meeting, August 29, 1962; NARA - Philadelphia, Correspondence Files Regarding Establishment of Park Service Sites at Sagamore Hill and Theodore Roosevelt's Birthplace (digital copy: NRBPA-79-413-ROOSEVELT(A), pp. 18-19.

[3] For the invitation to Kennedy, see letters, Straus to Kennedy, September 7, 1962, and March 21, 1963; Udall to Kennedy, April 10, 1963; Kenneth O'Donnell, Special Assistant to the President, to Straus, September 17, 1962, and April 5, 1963, and to Udall, April 10, 1963; John F. Kennedy Presidential Library, NARA - Boston: President's Office Files, Departments and Agencies, Box 80, Folder: Interior – Sagamore Hill 4/63 (copies in SAHI Curatorial Files). For inventories and bills of sale, see letter, Assistant Regional Director Edmunds to Ronald Lee, May 17, 1963, with inventory of "museum specimens, furnishings, and other effects" for Sagamore Hill; NARA - Philadelphia, Correspondence Files regarding Establishment of Park Service Sites at Sagamore Hill and Theodore Roosevelt's Birthplace (digital copy: NRBPA-79-413-ROOSEVELT(A), p. 68).

and possibilities in important ways: they are described subsequently. The NPS agreed to retain key TRA staff at both houses (which Oscar Straus regarded as a diplomatic triumph[4]), and to authorize the charging of fees to visitors – 50 cents at Sagamore Hill, 25 at the Birthplace – which required amending the Code of Federal Regulations.[5]

To a great extent, the issues that would shape the park's management for the next decade or so were clear at the outset. They involved physically maintaining the Theodore Roosevelt Home, telling its story, and deciding what to do with its landscape. But as the Park Service moved quickly to assert its own management style, it was planning that posed the park's first puzzle.

A Master Plan Introduces the Vision of a Restored Landscape

A master plan not only charts future developments but also – and perhaps more importantly – guides managers who have to choose among alternative actions: building a new structure or not, cutting the grass short or tall, directing resources towards visitor services or conservation. According to the agency's planning manual, it tells park managers "what to do and on what scale, where to do it, how, and within what limits."[6] The master plan becomes a yardstick for comparing the consistency of various alternatives with overall policy. Planning policy recommended that a master plan should be started following an executive or Congressional decision to add an area was to be added to the National Park system,[7] and so, in the spring of 1963 –before the property had changed hands – planners started work on what was called, in the language of the time, a "Package Master Plan."

The planning team was well-rounded (though, like other such groups at the time, it included no women): led by a naturalist (Donald Humphrey), it included an architect (J. Walter Roth), a landscape architect (Bernard Grace), and an interpretive planner (David Kimball).[8] Two came from the Eastern Office of Design and Construction, two

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[4] John Gable, recorded interview by author, Oyster Bay, N.Y., August 12, 2004. Though Gable did not state the reasons for Straus's belief that this was an important achievement, elsewhere in the interview he stressed the TRA's anxiety about bearing the financial burden for aging employees.

[5] Notice of rulemaking and related documents, June-July, 1963; NARA II - College Park, Secretary of Interior Classified Files 1959-63, Box 335.

[6] NPS, *Master Plan Handbook*, Release No. 1, April 1959, chap. 1, p. 2; NPS History Collection, Administrative Manuals, Harpers Ferry Center.

[7] NPS, *Master Plan Handbook*, 1959, chap. 3, p. 16.

[8] Documents in NARA - Philadelphia, NPS Northeast Office, General Correspondence 1952-66, Box 12, D-18, Folder: SAHI. A memorandum from Historian John Bond to the Chief Historian (July 14, 1967) identifies Donald Humphrey as "primarily responsible"; NPS Library, Washington, D.C.

from the Northeast Region. The planners visited the park and met with Jessica Kraft. Ronald Lee sent her a questionnaire.[9]

The plan built upon themes already well-established at Sagamore Hill. The park's interpretive focus would be Roosevelt himself: Roosevelt the public servant, reformer, family man, and conservationist. To support this theme, the house, its contents, and its surroundings all had important roles to play, but the furnishings were judged to be the key resource, for they had a special capacity for "giving an interesting and intimate insight" into Roosevelt's life.

The *Master Plan* also proposed to expand Sagamore Hill's interpretation to include the grounds, and this marked a departure from Association policy. The NPS had already signaled its interest in the landscape. The "Area Investigation Report" had argued for keeping the grounds "as much as possible the way they were during Theodore Roosevelt's life,"[10] and the legislative campaign for the park had strongly emphasized land conservation. Now the *Master Plan* pointed out that the landscape signified "Roosevelt's love of space, beauty and nature," and provided the setting for personal, family, and public activities.[11]

To support this new interpretive focus, the plan proposed to restore the grounds "to their general appearance during the historic period,"[12] and much of what followed was devoted to strategies for doing so. The plan called for nature trails representative of Roosevelt's "love of nature and his perambulations with his children and friends," operating the park in a manner "to suggest the farming and outdoor activities" of Roosevelt's time, minimizing intrusive modern developments, and – to keep such developments as might be necessary out of the park's historic core – purchasing an adjacent piece of property. Park boundaries in general would receive further study. Within the estate's historic core, the NPS would have to correct a variety of problems. The parking lot and concession building intruded painfully into the historic scene: they would have to be moved. Vanished features would be reconstructed or marked: the Stable and Lodge, the Barn, Mrs. Roosevelt's garden house, the garden itself.

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[9] Letter, Lee to Mrs. Harold Kraft, with attached and completed questionnaire, May 15, 1963; SAHI Central Files, Folder: H15, "Legislative Histories."

[10] Lawrence B. Coryell, William R. Failor, and Charles E. Shedd, Jr., "Sagamore Hill and the Theodore Roosevelt Birthplace, New York: Area Investigation Report," n.d. [1961]; NARA - Philadelphia, Records of the NPS Northeast Field Office, General Correspondence 1952-66, Box 35, p. 32.

[11] *Master Plan*, September version, Vol. I, chap. 1, p. 2 (approved chapter: Northeast Museum Services Center, Charlestown, MA [NMSC]).

[12] *Master Plan*, September version, Vol. I, chap. 1, p. 5 (approved chapter: NMSC).

Outbuildings like the Ice House that had been converted to other purposes would be restored to their original use and appearance.[13]

All of this made good sense. Through a combination of restoring historic features, reconstructing vanished ones, and removing modern ones, the plan proposed to return the landscape to a condition close to that of Roosevelt's time. It was an energetic proposal. It involved many discrete actions, some of them difficult and expensive. Their cumulative impact would be transformative. However, 40 years later, few of the actions it proposed have been taken; in important ways the landscape continues to look less like that of Roosevelt's time and more like that of the TRA – the 1950s. The reasons largely have to do with events that were going on concurrently with the master plan process. Those events, affecting both the historic estate's core and its boundaries, would severely curtail the agency's ability to realize its own proposals, and would contribute to the administrative failure of the master plan process. The history of planning at Sagamore Hill has always been closely tied to the shape of its landscape; to understand the master plan, therefore, we must first consider the reshaping of the landscape in the early 1960s.

Boundaries

As the title deeds were being prepared to transfer Sagamore Hill to NPS ownership, an intricate series of boundary adjustments was underway. The TRA made the first move, and it was to shrink the park. By the summer of 1961, the association had decided to sell 10 acres of the northern portion of the estate – the arm that extended northward from Sagamore Hill Road – to neighboring landowner Philip Zoller. The trustees' resolution affirmed that only the portion of the original estate south of Sagamore Hill had any value to the park; that the land to the north was useful only for protecting the approach road, which required no more than a "small portion."[14] Conrad Wirth blessed the sale and advised the association to carry it out before the transfer took place.[15] Aware of this, the authors of the "Area Investigation Report" delineated a "suggested limit for disposal," a new boundary that followed an old fence line across Smith's Field a little less than 1,000 feet from the house (Fig. 10). They urged that the disposition of Lot 514 "should not go beyond the limit" of this line, as the remaining acreage might provide valuable space outside the estate's historic core for administrative and visitor facilities currently located within it.[16] But by mid-summer, the Theodore

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[13] *Master Plan*, September version, Vol. I, chap. 1, pp. 4-6 (approved chapter: NMSC).

[14] Resolution to sell 11 acres. TRA Executive Committee minutes, October 5, 1961.

[15] TRA Executive Committee Minutes, June 15, 1961.

[16] Coryell, Failor, and Shedd,"Area Investigation Report," Property Map and p. 17.

Roosevelt Association agreed to sell Zoller an additional acre,[17] pushing the park's boundary back to a line about 700 feet from the house.

The TRA's assessment of the northern arm was debatable. The *Master Plan* included a Historical Base Map, created with Archibald Roosevelt's assistance, and this showed a path leading to a long-vanished "pergola," also identified as "The Nest"[18] (Fig. 11). It had stood on a rise of land about halfway between the gardens and the estate's northern boundary. This was Edith Roosevelt's favorite spot for sitting and reading. The authors of the "Area Investigation Report" drew their "suggested limit for disposal" so as to keep the Nest's site inside the park. The TRA's decision to sell the extra acre put it outside the boundary. The master plan team adjusted to the new reality by proposing to reorient the path and reconstruct the pergola on a lower slope about 200 feet closer to the house.[19] It would prove more difficult for them to adjust their plans for visitor facilities.

At the same time, the TRA was negotiating to acquire another parcel (Fig. 12). In 1938, Theodore Roosevelt's son, Theodore Roosevelt, Jr., had built a comfortable mansion across the apple orchard from his parents' house. Roosevelt's widow Edith sold him the four-acre plot of land, which had now come onto the market upon the death of her daughter-in-law, the widow of Theodore Roosevelt, Jr., in 1960. Indeed, it was this development that had spurred the TRA to approach the NPS, and the association had asked for a quick and clear signal of the agency's intent with regard to the property. Agency opinion was immediately favorable to acquiring it. Assistant Regional Director Palmer saw some value in adapting the building for public use, administrative offices, storage, a library, or exhibits. The property had a "nuisance value," too: if the Park Service did not obtain it, someone else would. That would put the estate's ambiance at risk, and might make it difficult to develop a trail to the beach.[20] All in all, the NPS favored acquisition,[21] and Oscar Straus set about negotiating with

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[17] Letter, Straus to Mrs. Reginald Rose, July 18, 1961; SAHI: Central Files, Folder H15.

[18] The historical base map contained in the Philadelphia version of the oversize material identifies the site as a "Pergola." The version in Denver, which includes slightly more detailed information throughout, calls it "The West" – presumably a misreading of Archibald's handwritten notation "The Nest." The structure's significance is discussed in the *Cultural Landscape Report* (see below).

[19] *Master Plan*, drawings volume, *Historical Base Map and General Development Plan* (photocopy in SAHI Curatorial Files). Also Regina Bellavia and George W. Curry, *Cultural Landscape Report for Sagamore Hill National Historic Site, Vol. 1: Site History, Existing Conditions, and Analysis* (Boston, MA: NPS, Northeast Region, Olmsted Center for Landscape Preservation, July 1995), p. 28. The reconstruction was never carried out.

[20] Memorandum, Assistant Regional Director George A. Palmer to Lee, October 24, 1960; NARA - Philadelphia, NPS Northeast Office Administrative Correspondence 1953-68, Folder: Sagamore Hill 10/53-8/61.

[21] See, for example, the "Area Investigation Report," p. 16.

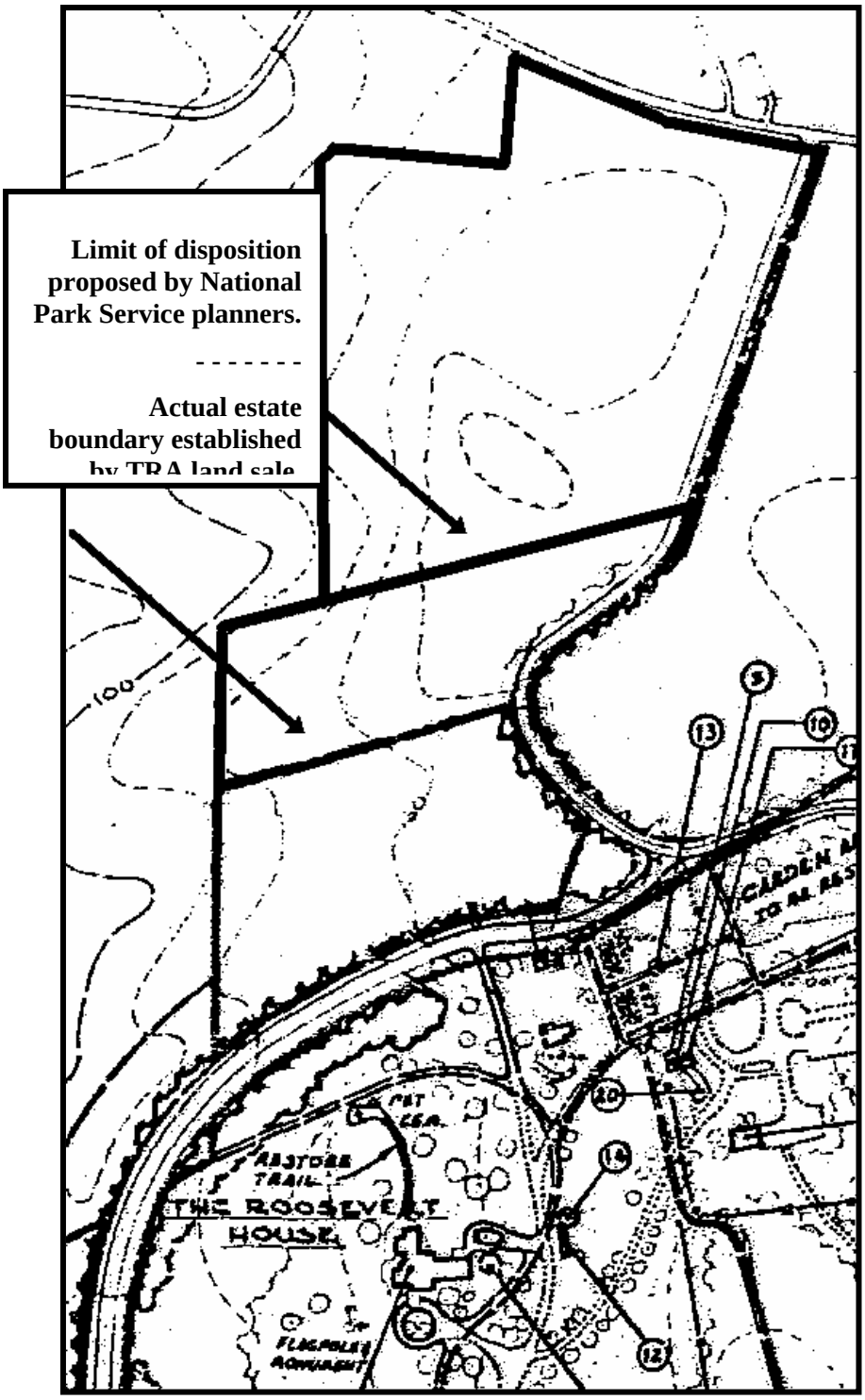
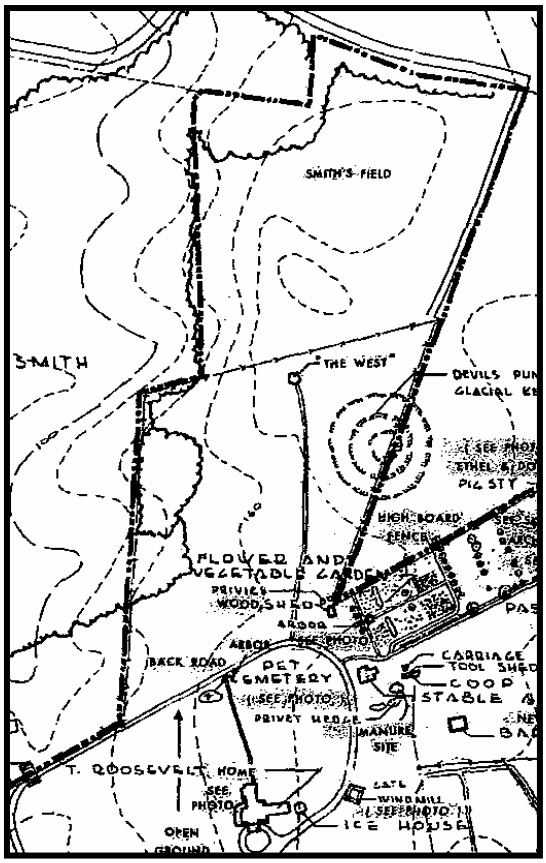


Fig. 10. Map of Sagamore Hill's northern arm, showing limit of land disposition proposed by NPS planners and actual boundary following the TRA land sale. (Based by author on Property Map from 1961 "Area Investigation Report" and General Development Plan and Historical Base Map from 1963 *Master Plan.*)



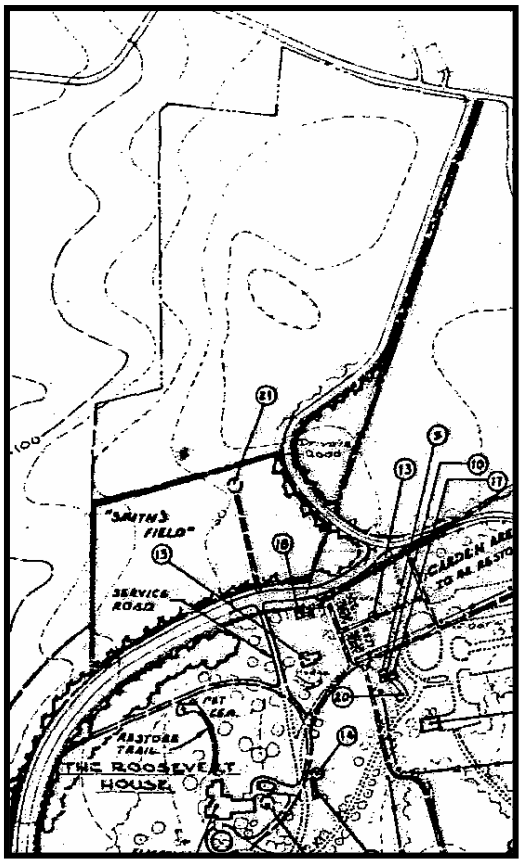


Fig. 11.
The truncation of Sagamore Hill's northern arm and the loss of Mrs. Roosevelt's "Nest." Details from the *Master Plan*'s Historical Base Map, *top left* (showing the Nest's site in relation to the estate's original extent), and General Development Plan, *top right* (showing the planners' efforts to adjust to the TRA's land sale). *Right*, an undated photograph shows Mrs. Roosevelt at the Nest.

(Maps reprinted from 1963 *Master Plan*; photograph courtesy of Sagamore Hill NHS.)

Theodore Roosevelt III, his mother's executor. Unwilling at first to accept less than the full market value of the property (which he believed to be about $140,000), Theodore Roosevelt III did agree to give the TRA a right of first refusal. Straus put an offer of $75,000 on the table, with $10,000 up front to secure a two-year option.[22] By the beginning of August, the two had agreed on an option with a total purchase price of $115,000,[23] and in May 1963, as the association was preparing to hand over Sagamore Hill, there was nothing further to do than to exercise the option. Old Orchard was acquired, and entered the National Park System as part of Sagamore Hill.

Meanwhile, interesting possibilities for expansion presented themselves along the park's southern boundary (Fig. 13). In the spring of 1962, Oyster Bay realtor Grover O'Neill found himself charged with disposing of 20 acres of Roosevelt family land. A four-acre parcel stretched along the west side of Sagamore Hill Road, touching the southwest corner of the park. A 16-acre parcel across the road lay along the park's southern boundary, directly south of the Theodore Roosevelt Home at a distance of between 300 and 400 feet. Both parcels had once belonged to James A. Roosevelt: some of the land had belonged, even earlier, to Sagamore Hill, but had been sold by Theodore Roosevelt. Now the smaller property belonged to John K. Roosevelt, while the larger lay in Emlen Roosevelt's estate. O'Neill felt some urgency about the sale: at least one executor – John K. Roosevelt – wanted to dispose of the property before it passed into a "complicated heir situation."[24]

By the spring of 1962, Sagamore Hill's future as a national park was virtually assured. Kennedy had delivered his environmental address on March 1. The House approved Sagamore Hill's acquisition on April 2. The Senate's vote and the President's signature were virtually certain. O'Neill thought the parcels were "so closely a united part of Sagamore Hill" that they should be added to the new park and, after obtaining John Roosevelt's approval, began to press the National Park Service to acquire them.[25] At first, his efforts seemed to meet with success. Early in May, NPS Associate Director Hillory Tolson gave him a "tentative promise" that, if the two parcels "fitted into the future planning of Sagamore Hill," the Park Service would consider asking for legislation to acquire them in the 1963 Congressional session. Park Planner William Failor (who, as one of the authors of the "Area Investigation Report," knew the park well) agreed with O'Neill, reporting to Regional Director Lee that the four-acre parcel was directly visible

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[22] Correspondence between Oscar Straus and Bertha Rose, Ethel Derby, and Theodore Roosevelt, III, July 1961; SAHI Central Files, Folder: H15.

[23] TRA Executive Committee Minutes, August 1, 1961.

[24] Memorandum, Park Planner William R. Failor to Lee, May 8, 1962; NARA-Philadelphia, Box 6, NPS Northeast Office Administrative Correspondence 1953-68, Folder: Sagamore Hill 9/61-4/64.

[25] Letter, Grover O'Neill to Lee, May 11, 1962; NARA - Philadelphia, Box 6, NPS Northeast Office Administrative Correspondence 1953-68, Folder: Sagamore Hill 9/61-4/64.

from the house and grounds. Both parcels indeed were "important in the maintenance and control of the views from Theodore Roosevelt's House and immediate grounds." As with Old Orchard, there was also the nuisance potential to consider. Subdivided into two-acre building sites, they could accommodate as many as 20 suburban houses along the park's entrance road and southern boundary. Acquiring the properties would prevent this and "give permanent protection to the entrance."

There was yet another factor to consider. "It would seem," O'Neill wrote, "that the Park Service long term objective...would be the restoration of the grounds to its original character...." If so, the Theodore Roosevelt Association's visitor facilities would have to be moved out of the center of the estate. Emlen Roosevelt's 16-acre parcel would provide an excellent place to put them. It would also allow the park to restore the estate's original entrance drive, which had crossed a corner of Emlen's property. Finally, Failor noted that Sagamore Hill served as a public park. The larger parcel could accommodate ballgames and other children's activities that were taking place around the house and in the parking lot.[26]

By mid-September of 1962, buyers were eying the property with interest, and they included both local residents and real estate developers. By then, the Senate had voted and President Kennedy had signed the legislation: Sagamore Hill would pass into federal ownership. And by then – at Lee's request – O'Neill had presented his case to the TRA's Sagamore Hill Committee. He argued strongly for acquiring the land. In addition to Failor's arguments, O'Neill pointed out that, with some clearing, a view of Oyster Bay could be gained from Emlen Roosevelt's 16-acre parcel. And, he assured the committee, he had "reason to believe" that neighboring landowners would permit the necessary clearing. Stressing the risks of development, O'Neill urged the association to take the long view: the rewards of acquiring the property would "begin to appear more and more as housing increases." But the only way to reap them was to buy the property. At the going rate of about $8,000 per acre, the purchase would come to about $132,000, though O'Neill hinted that a quick sale might lead to a lower price. The TRA's reply was curt: the association would not buy the properties. To Ronald Lee, committee member Eugene Taliaferro delivered an equally curt but more sweeping verdict: "We find nothing to warrant the purchase by Sagamore Hill of these properties." Not only would the association not acquire them, it now urged the NPS not to do so, either.[27]
The Theodore Roosevelt Association never offered a reasoned reply to O'Neill's and Failor's forceful and detailed arguments, at least not in writing. But Taliaferro did

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[26] Memorandum, Failor to Lee, June 1, 1962; NARA - Philadelphia., Box 6, NPS Northeast Office Administrative Correspondence 1953-68, Folder: Sagamore Hill 9/61-4/64.

[27] Letter, Eugene Taliaferro to Lee, October 3, 1962; NARA II – College Park, NPS Property Management and General Services L58, Box 80, Folder: Part 2 New York.

address a number of other boundary issues in some detail. The "Area Investigation Report" had recommended several small adjustments along the park's northern boundaries (Fig. 12). All but one involved other Roosevelt family members, and Lee referred them to the committee. Taliaferro now pointed out that two of the small parcels in question (Nos. 702 and 239) belonged to Eleanor Roosevelt's estate, and would come to the park with Old Orchard. He advised the Park Service to give No. 239 to Mrs. Philip Roosevelt in exchange for another small parcel that she owned – Lot No. 516, which lay in the angle between the estate's eastern and northern arms. The trade would not only provide a buffer at the end of Sagamore Hill's access road, but would also straighten out Mrs. Philip Roosevelt's border. Taliaferro also urged the NPS to buy a small strip of land along the access road belonging to Eleanor Zoller (a portion of Lot No. 515). And finally, he recommended asking John Roosevelt to donate the hook-shaped half-acre parcel at the park's southwest corner (No. 510) – the same lot that O'Neill was currently offering along with the two larger lots.

Asked to review the TRA's recommendations, Lee's Regional Chief for Boundary Studies, Harry L. Smith, endorsed all but one: contradicting the association (but citing Failor's assessment), he urged acquisition of O'Neill's 20 acres. Now Lee referred the matter to Director Conrad Wirth. Ignoring the recommendations of his own staff, Lee advised the director to endorse the TRA's recommendations in their entirety, and that is what Wirth did. He told Lee that because the "Area Investigation Report" had not recommended acquiring the John and Emlen Roosevelt properties, and because neither Lee nor the association now recommended them, the question could be considered closed. As for the little hook-shaped parcel, it could be acquired, but only by donation.[28]

Bertha Rose, Taliaferro's colleague on the committee, was convinced that John Roosevelt would refuse to make the donation. On the other hand, she was sure Mrs. Philip Roosevelt would happily agree to the proposed trade.[29] What happened was exactly the opposite: John quickly accepted the TRA's proposal, while Mrs. Philip Roosevelt found the complexities of sorting out certain family title issues insurmountable. And so the southwest corner gained a little bulge, while the northern border remained ragged. The Zoller acquisition fell through, too, leaving a crucial segment of the access road unprotected. As for the large parcels to the south and west, O'Neill tried one last time. Writing to Lee just days after the transfer, he offered the NPS

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[28] Memorandum, Harry L. Smith to Regional Director, October 19, 1962; Regional Director to Director, November 5, 1962; and Director to Regional Director, December 20, 1962. See also letter, Lee to Straus, January 3, 1963; NARA - Philadelphia, Entry 413, NPS Northeast Regional Office, General Correspondence 1966-68, Box 28.

[29] Letter, Bertha Rose to Oscar [Straus], November 18, [1962]; SAHI: Central Files, Folder H15. For the small parcels, see also letter, Straus to Lee, January 31, 1963; NARA - Philadelphia, Entry 413, NPS Northeast Regional Office General Correspondence 1966-68, Box 28.

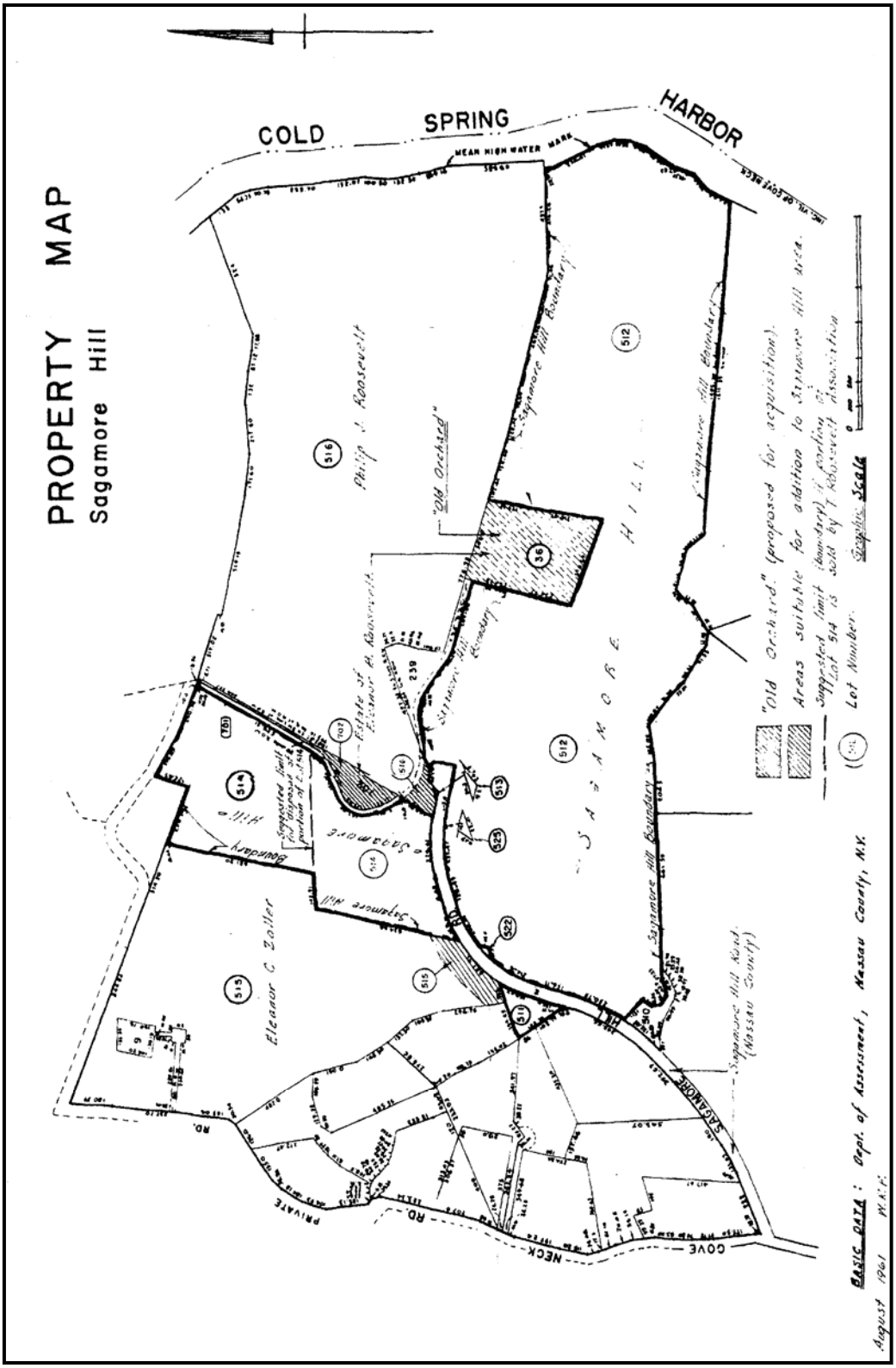

Fig.12. Property Map from 1961 indicating parcels suggested for addition to park. (Reprinted from Coryell, Failor, and Shedd, "Area Investigation Report").

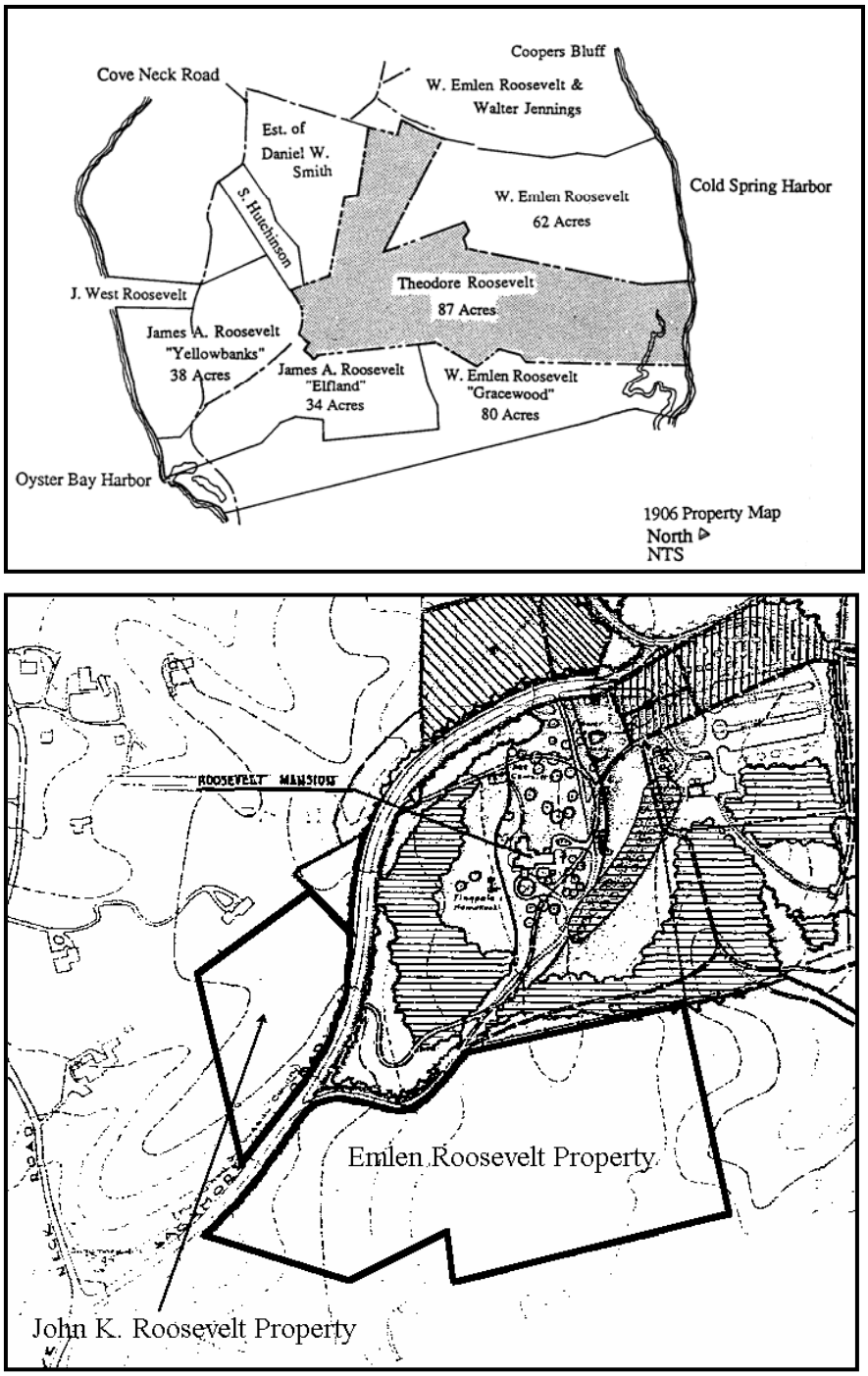

Fig. 13. Map of Theodore Roosevelt estate and surrounding estates in 1906, and diagram showing location of John K. and Emlen Roosevelt properties (proposed for acquisition in 1961) in relation to Sagamore Hill. (Map reprinted from Bellavia and Curry, *Cultural Landscape Report, Vol. 1*; diagram by author based on Property Map from "Area Investigation Report" and Vegetative Treatment Plan from 1963 *Master Plan*.)

a four-acre segment of the now subdivided property for $32,000. This, he felt, "would fully satisfy the demands for an environment for the Theodore Roosevelt mansion that would be entirely protective, reminiscent of the way things looked in Theodore Roosevelt's time." Lee replied that "it would be very desirable to have the lands in question to retain...the scene that Theodore Roosevelt knew and loved so well," but he did not know where the agency could find the necessary funds. He was sorry "we cannot be more encouraging."[30]

One has to ask, at this point, why Lee did not turn to the TRA for help. It was true that the association had originally declined to acquire the property. But by the summer of 1963, evolving plans for the park were pointing with increased urgency to the importance of doing so. Might not Taliaferro and Rose change their minds? Early the following month, a delegation visited the Sagamore Hill Committee to raise the question. The association did change its position: it would support acquisition. But still, no request for financial support came from the Park Service – at least, not in writing. The reason probably had to do with something quite unrelated. In August, the TRA had received a tax bill from the town of Oyster Bay. It was for Old Orchard, for the sum of $1,640.73. The association declined to pay it and passed it on to Ronald Lee. Lee asked Oyster Bay to forgive the taxes, but the town was unrelenting: Nassau County's Department of Assessment assured them that the property had been in the ownership of Eleanor Roosevelt's estate on the taxable status date, and either the association or the federal government must now pay up. Lee turned back to the TRA: would the association pay the bills "as a public relations gesture"? By this time, the TRA had just paid the most recent property tax bill from Cove Neck Village (for $1,319.24) and Lyman Tondel declined, pointing out rather stiffly that the association had already paid some taxes: it would pay no more. Lee was now in an awkward position. The federal government did not pay local taxes on property that it owned. To pay taxes on property that it had *not* owned, as of the taxable status date, was problematic at the very least. Yet Lee advised Director Wirth not to ask the association for any further money: the tax bill would have to be paid out of NPS funds – perhaps out of the interest on the association endowment.[31]

It is reasonable to infer that, early in August, Lee may have been preparing to ask the TRA for help acquiring the Emlen Roosevelt property, but that, faced with the

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[30] Letters, O'Neill to Lee, July 11, 1963, and Lee to O'Neill, July 23, 1963; NARA - Philadelphia, Entry 413, NPS Northeast Regional Office General Correspondence 1966-68, Box 28.

[31] Letter, Lyman Tondel to Lee, August 29, 1963, with attached tax bill; Memoranda, Acting Regional Director Palmer to Superintendent, September 17, 1963, and Superintendent Mullaly to Lee, September 23, 1963; letter, Lee to Tondel, October 3, 1963; letters, Chief Clerk, Oyster Bay, to Mullaly, October 18, 1963, and Tondel to Lee, October 9, 1963; Memorandum, Lee to Wirth, November 13, 1963; NARA - Philadelphia, Entry 413, NPS Northeast Regional Office General Correspondence 1966-68, Box 28.

association's intransigence over a tax bill one-20th the size of what he was about to request, he realized it was hopeless. A little over a year later, he would tell colleagues that the parking lot question needed to be restudied because the association had declined to buy the land for it.[32]

The Problem of Landscape Restoration

What happened to Sagamore Hill's boundaries had direct consequences for the planners considering its core, because any solution to the basic problems of the core – any serious attempt to restore its historic appearance – required access to land outside that core. The consequences of Sagamore Hill's shrinkage to the north, and of its failure to expand to the south, had become fully evident before the master planning process drew to a close.

A basic strategy for the core had begun to emerge as early as 1961. The first detailed statement of a restoration strategy came from a member of the Roosevelt family. Archibald – Theodore Roosevelt's son – made it clear that he was not connected to the Theodore Roosevelt Association, nor would he "want to be, for many reasons."[33] In the spring of 1961 he wrote a very long and apparently unsolicited letter to Conrad Wirth. Arguing that a memorial to a great man should be "kept as much as possible to resemble the way it was used" during his own time (a theory Wirth would have found congenial), Roosevelt felt compelled to register "a very serious complaint" about the association's handling of the landscape. So richly detailed and expressive was his letter that it deserves to be quoted at length.

> At the time of the occupation of the house by Theodore Roosevelt, and at the time that he built it, people with his income and his social position and his type, always tried to have a farm. They had a lot of fun fooling themselves that they were farmers. Of course, in those days it didn't cost very much and they enjoyed the illusion.
>
> In accordance with this idea, the grounds were fixed up like a farm of a very special type.
>
> There were, as a result, extensive stables, barns, vegetable gardens, fields and woodsheds, all of which seems to me to have been completely forgotten and changed under the present management of the Theodore Roosevelt Association.

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[32] Memorandum, Lee to Chief, EODC et al, January 18, 1965; NARA - Philadelphia, NPS Northeast Office General Correspondence 1952-66, Box 12, D-18, Folder: SAHI.

[33] Letter, Archibald B. Roosevelt to Conrad Wirth, May 16, 1961; NARA - Philadelphia, Administrative Correspondence 1953-68, Sagamore Hill, 10/53-8/61, Box 6. Roosevelt's objection to the TRA may have had more to do with his belief that the organization harbored Communist sympathizers than with anything connected to the estate: see the biographical information on him on the TRA's website (consulted November 2004).

Taking several examples, we come to the parking lot. The parking lot never should have been where it is, in my opinion. It had completely eliminated one of the main features of Sagamore Hill. That feature was the vegetable garden and cut flower garden. The vegetable garden and cut flower garden were the pride of both my father and mother – particularly of my mother in as far as the vegetable garden went. Like most vegetable or kitchen gardens, the flowers are more or less in one place, and the lady of the house went down and cut the flowers and arranged them in the house herself. Then the extensive vegetable garden went right on to the boundary of the present T.R. Jr. estate [i.e., Old Orchard]. The row of cherry trees and various fruit orchards were contained therein. The apple orchard of course was located where the T. R., Jr. house now stands.

Also connected with that was a stable and a farmer's cottage. These burned down, but I think a project should be to reproduce them. In other words, I believe that the parking lot as it is now located never should have been there and should be taken out. At the expense of only a few more steps a parking lot could be placed in what is known as Smith's Field, which is north of the present parking lot or old garden.

To repeat, I believe that the stable and farmer's cottage should be reproduced as a major job and also the old barn which was located on the southern edge of the property about south by east of the Sagamore Hill buildings. The barn, which was the oldest building on the property when the property was an old turnip patch and hay field, would be restored as the target range which was used a great deal to T.R. and would be of interest, I believe, particularly to sportsmen and military men.

Then the whole planting should be arranged to make it look as it was then.

I understand that the reason it looks so strange now is that for some reason or other the people in the Theodore Roosevelt Memorial deemed fit to get hold of the Long Island Garden Club and "landscape" the whole thing with various plantings of dogwood, shrubs, trees and so forth, absolutely out of character with the place it used to be, which of course should be eliminated and restored to the old way.

Among minor horrors is the one of turning the ice house, which is unique today, into what is now known as a "comfort station". I hate those things being called "comfort stations"

> anyhow but to ruin a lovely antique in this manner seems to me positively indecent.
>
> Concerning the possibility of turning part of the property into a very useful conservation project, I again remind you that I believe it is very feasible to freshen up Eel Creek which is on the eastern edge of the property and is a creek about three quarters of a mile long. I believe it could be freshened up very easily by putting a dam across the place confident it would become a tremendous sanctuary for wild shore birds and water fowl where the property ends. There is a heron rookery very close to Eel Creek and I feel confident it would become a tremendous sanctuary for wild shore birds and waterfowl.
>
> I am glad to get all of this off my chest....I feel that the government has only a right to know what the opinions are of someone who has lived in the place, and known the man for whom the memorial is made.[34]

In this letter, Archibald had laid out every major element of a sweeping restoration plan for the landscape. The farm and gardens must be recovered, the parking lot moved, the Stable and Lodge reconstructed, the Ice House returned to its original condition, inappropriate garden plantings removed. Use should be made of the estate's natural areas, particularly around Eel Creek.

Conrad Wirth was paying close attention: he responded appreciatively to Archibald's letter, and promised to call upon his "intimate knowledge for additional data."[35] In the summer of 1963 he did just that. In the meantime, Archibald had become more acerbic in his criticisms of the TRA: "Whoever did the landscaping," he wrote, "...certainly made a botch of it so far as reproducing landscaping of the period of the early 1900's and late 90's is concerned."[36] By July, at any rate, the agency had provided him with maps and, at Wirth's request, he was ready to sit down with his sister Ethel to reconstruct what they could from memory.[37] Their work was incorporated into the *Master Plan*'s Historical Base Map, dated July 1963; details such as the locations of long-vanished sunflowers, apricot trees, and pig sties would not have been available otherwise

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[34] Letter, Archibald Roosevelt to Wirth, May 16, 1961; NARA - Philadelphia, Administrative Correspondence 1953-68, Sagamore Hill, 10/53-8/61, Box 6.

35 Letter, Wirth to Archibald Roosevelt, June 13, 1961; NARA - Philadelphia, Administrative Correspondence 1953-1968, "Sagamore Hill 10/53-8/61," Box 6.

36 Letter, Archibald Roosevelt to Wirth, August 26, 1963; NPS Library.

[37] Letter, Archibald Roosevelt to Wirth, July 20, 1963; NARA II - College Park, Office Files of Conrad Wirth, Box 22 Region V-VI, Folder: Region V 1963.

(Figs. 14, 15). Archibald "reviewed and approved" the map at a meeting with the master plan team on August 8.[38]

The plan's text, meanwhile, had incorporated all of Archibald's recommendations. The grounds and forest would be restored as nearly as possible to their historic conditions, the park operated so as to "suggest the farming and outdoor activities Theodore Roosevelt engaged in," the parking area and concession building relocated in connection with "future grounds restoration." Missing structures and features – the stable, lodge, barn, Mrs. Roosevelt's garden house, the garden itself – would be reconstructed or marked, existing outbuildings like the ice house returned to their original use and condition. An "interpretive trail system" would be established to commemorate Theodore Roosevelt's "love of nature and his perambulations with his children and friends."[39] Regional Director Lee approved the chapter setting forth these goals on August 22, the NPS Director on September 19, 1963.[40]

The landscape envisioned in the *Master Plan* included two rather large elements that did not figure in Archibald's vision, or for that matter in Theodore Roosevelt's estate. One was a new visitor center, or "visitor contact station." Here would be concentrated every aspect of the NPS's interactions with the public, apart from their viewing of the house and park themselves. Uniformed staff would sell tickets there (rather than in the front hall of the house), as well as offering information and orientation. There would be introductory exhibits, literature, and restrooms. There might also be an auditorium for documentary films and audiovisual programs, and museum space for the exhibits that were then displayed on the third floor of the Theodore Roosevelt Home.[41] Where to put such a substantial structure was an important question, and one to which we shall return.

The second feature that had not been part of Roosevelt's Sagamore Hill was Old Orchard. In the fall of 1960, when the house's fate had been a pressing matter, two experts had carefully studied its potential: Bertha Rose for the TRA, and Assistant Regional Director George Palmer for the NPS. Mrs. Rose thought Old Orchard particularly well suited for exhibits, and she quickly delineated a proposal to transfer the

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[38] J. Brown, J. DeMarce, and P. Steele, *Historic Resources Management Plan*, *Sagamore Hill* (U.S. DOI, NPS, December 1975), p. 10. Archibald Roosevelt's sketch of flower and vegetable gardens is reproduced in the *Cultural Landscape Report*, Vol. 1, p. 51.

[39] *Master Plan*, September version, vol. 1, chapter 1, pp. 6-7; NMSC. The May version had contained essentially the same guidelines, but had been even more explicit about the restoration's overall goal: "Operation of the area as a 'gentleman's farm,' such as Theodore Roosevelt maintained, shall be part of the preservation and restoration concept" (*Master Plan*, May version, "Preservation and Use Objectives," p. 4); NMSC.

[40] Assistant Director A. Clark Stratton signed for Director Wirth.

[41] *Master Plan*, May version, "Management Prospectus," pp. 3-4; NMSC.

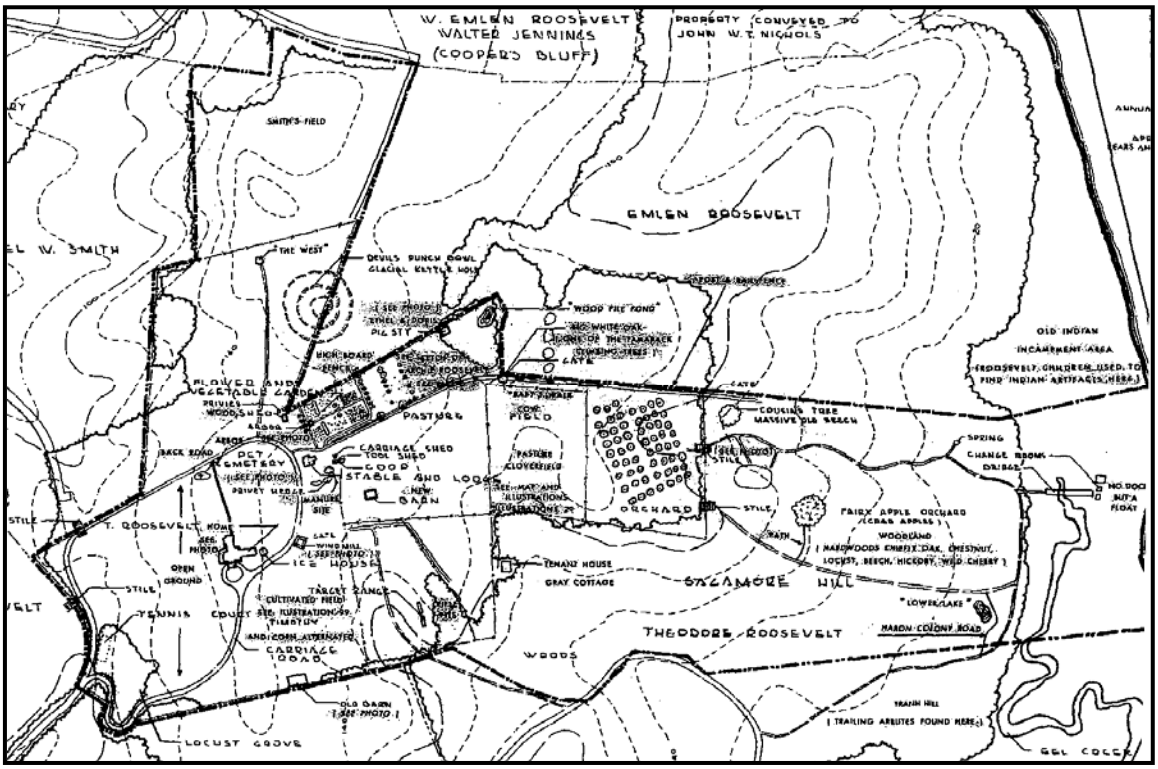

Fig.14. Detail of the *Master Plan*'s Historical Base Map, drawn by NPS planning staff with the aid of interviews with Archibald Roosevelt, dated August 8, 1963. (Courtesy Denver Service Center.)

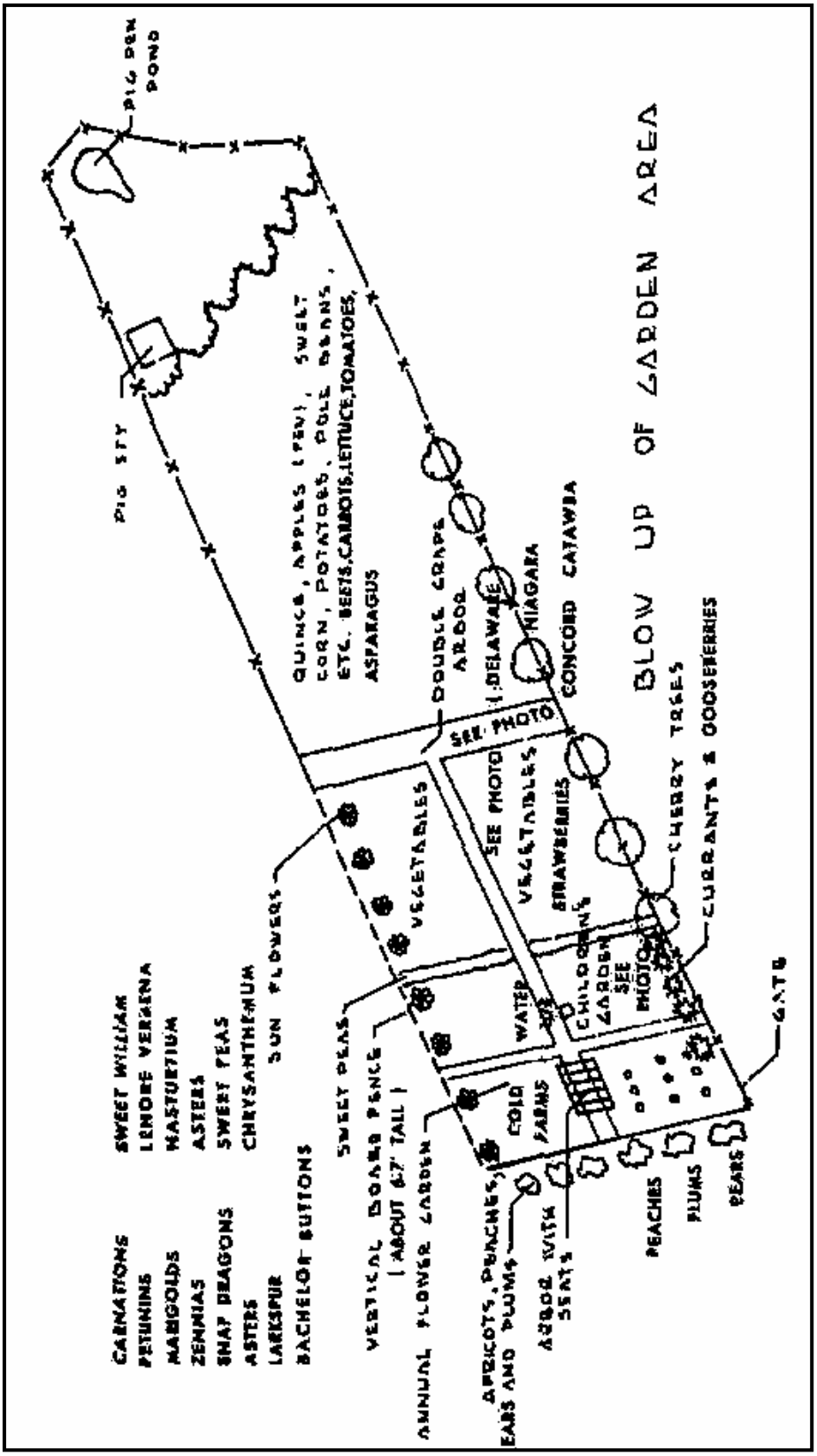

Fig. 15. Sagamore Hill's original gardens, as reconstructed by NPS Master Plan team in 1963 on the basis of interviews with Archibald Roosevelt: detail of Historical Base Map, dated August 8, 1963, showing the original fruit and flower gardens, children's garden, arbors, and area for pigs. (Courtesy the Denver Service Center.)

exhibits from the third floor of the Theodore Roosevelt Home.[42] Palmer too concluded that "the building could be adapted for public use," but on the whole his assessment was more guarded:

> It is more spacious than some of our visitor centers and its arrangement of center hall and drawing room could be adapted for exhibit space. The location of the building, however, is in an opposite direction from the old house, and, frankly, neither [Superintendent] Ronalds [n]or myself thought that it had any possibilities for adding to the interpretation of Sagamore Hill. It could be used for administrative offices, for storage, for library and specialized exhibits on the Roosevelt family or the Roosevelt era.[43]

Useful or not, by the time the *Master Plan* came to be written, Old Orchard was part of the park, and the circumstances of its acquisition ruled out any thought of removing it. The question was not whether to keep it but what to do with it. And the answer given, almost reflexively, by the planners was: turn it into a visitor center. To understand why they answered in this way rather than in another – by proposing, say, a museum or staff housing – one has to place the *Master Plan* within a larger context of Mission 66.

Mission 66

Mission 66 was Conrad Wirth's program for getting Congress to appropriate sufficient funds to run the system as it deserved to be run. During the early 1950s, deteriorated conditions throughout the parks had become a national scandal, which prominent Western writer Bernard deVoto highlighted in an article sarcastically entitled "Let's Close the National Parks."[44] Perhaps, thought Wirth, a 10-year plan would persuade Congress to give him the means of fixing the system. The idea came to him on the night of Saturday, February 6, 1955, and on the following Monday he organized his staff to create Mission 66[45] – so called to draw attention to the 50th anniversary of the National Park Service in 1966. The "mission" of Mission 66 was, quite simply, "to provide adequate protection and development of the National Park System for human

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[42] Memorandum, Mrs. Reginald P. Rose to Straus, October 24, 1960, and "Further suggested usages for Old Orchard," April 1961; NARA - Philadelphia, Box 6, NPS Northeast Office Administrative Correspondence 1953-68, Folder: Sagamore Hill 10/53-8/61.

[43] Memorandum, Palmer to Lee, October 24, 1960; NARA - Philadelphia, NPS Northeast Office Administrative Correspondence 1953-68, Folder: Sagamore Hill 10/53-8/61.

[44] Bernard deVoto, "Let's Close the National Parks," *Harper's*, October 1953, pp. 49-52.

[45] For the genesis of Mission 66, see Roy E. Appleman, "A History of the NPS Mission 66 Program" (NPS: January 1958), esp. pp. 2 ff. and 82 ff.; NPS Library.

use."[46] Early in 1956, President Eisenhower recommended the program to Congress, and it was an immediate success: Congress increased the Service's Fiscal Year 1957 appropriation by almost 40%, while the budget for Buildings and Utilities alone rose from an intended $4.4 million to $14.25 million.[47]

Mission 66 left a clear imprint on Sagamore Hill's *Master Plan*. Some drafts were actually entitled "Mission 66 Edition." Another was called "Package Master Plan," a term that also arose within the Mission 66 context.[48] In the "package system" of master planning, teams of "experienced and well oriented men" – including management and design professionals from the regional and design offices – worked with park staff. This process was intended to produce better coordination among program activities, as well as simplified review and approval procedures.[49] It may also have been intended to help achieve another goal of agency planners. "Can you stretch your imagination," the planners asked, "so as to let this Master Plan idea cover a little more ground than has been our habit?"[50] The team approach would ensure that the resulting plan became far more than a mere "necessary step leading to a construction project." The word "package," however, did not refer to the master plan team. Mission 66 was based on the notion that park projects should be funded and carried out "in large increments, or what might be called a 'package' basis," rather than in a piecemeal way. This approach, the Park Service assured Congress, would make its funds stretch farther.[51] A package master plan, therefore, was a plan conducive to package implementation. But as we shall see, it was also a plan that had been produced according to the package system: in packages, i.e., discrete chapters or sections that could be separately produced, reviewed, and approved.[52] In the fall of 1962, in any case, the package system was just "coming into use":[53] it was still relatively untried when the process was launched at Sagamore Hill early the following spring.

Beyond its forms and procedures, Mission 66 made a substantive impression on Sagamore Hill's plan through its emphasis on visitor service. To provide a positive

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[46] "Mission 66 for the National Park System" (U.S. DOI, NPS: January 1956, with cover letter to President Eisenhower, February 1, 1956), page preceding table of contents; NPS library.

[47] "Mission 66," p. 115b.

[48] The history of Sagamore Hill's master plan drafts is complex and is summarized in the subsequent section on the plan's outcome and legacy.

[49] "Mission 66 Progress Report," October 1963, p. 8; NPS Library.

[50] *Master Plan Handbook*, Release No. 1 (U.S. DOI, NPS: April 1959), chap. 1, p. 4; NPS History Collection, Administrative Manuals, Harpers Ferry Center.

[51] "Mission 66," p. 73.

[52] "Field Guide: Package Master Plan" (U.S. DOI, NPS: November 1962), App. B and C, *passim*.; NPS History Collection, Administrative Manuals, Harpers Ferry Center.

[53] "Mission 66 Progress Report," p. 8.

experience for visitors, the 1956 program statement argued, "One of the most pressing needs for each area is the visitor center."[54]

> The visitor center is a public-use building containing, as fully as they can be supplied, all the aids and helps necessary to get the visitor off to a good start. This means providing information about accommodations, services, routes of travel, and park regulations, as well as conveying some understanding of the features of the area and their significance. In other words, its function is both informational and, in some degree, interpretive.[55]

Among the concerns driving Mission 66's emphasis on visitor services, and visitor centers, was the frightening specter of soaring numbers of visitors swamping parks that were ill-prepared for them – all against a background of physical deterioration and neglect. Ronald Lee expressed this concern in 1961 in a speech to park officials about the role of interpretation within the parks:

> The great cloud on the National Park horizon, today, of course, is the prospect of the endless growth and multiplication of even the proper kinds of public use. Director Wirth says the people are loving the parks to death. Marion Clawson predicts a demand for National Park type of park use forty times the present demand by the year 2000.[56]

Park officials had to consider the question of what constitutes "proper and compatible public use" of a park and "how much public use there can be without destroying it," and Lee encouraged interpreters to add their perspective.

By 1957, at any rate, the NPS had changed its basic model for visitor facilities "from small, museum-type buildings to those of open design, embodying information and interpretive facilities and services, exhibits, and rest areas"[57] – and capable of efficiently serving and directing large numbers of visitors. Mission 66 planners consulted with Ronald Lee, director of the new Division of Interpretation, and decided the system needed 109 of these new centers. Lee saw them as central to an "integrated interpretive program" that would reach "deep into the entire park program." By 1961, Lee could note that the visitor center program had become "one of the most widely praised features of Service work."[58] And as the program drew to a close five years later, the agency could claim to have built or at least begun 100 of the new visitor centers,

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[54] "Mission 66," p. 92.

[55] "Mission 66," pp. 92-93.

[56] Ronald F. Lee, "Comments on the Role of Interpretation in the NPS," February 16, 1961, p. 5; NARA - Philadelphia, NPS Northeast Office Papers.

[57] NPS, "Mission 66 Progress Report," March 1966, p. 35; NPS Library.

[58] Lee, "Comments on the Role of Interpretation in the NPS," p. 8.

including some quite elaborate examples containing "souvenir sales, food services, and complex audiovisual equipment." Some had an auditorium; many housed administrative offices.[59]

Restoring Sagamore Hill's Landscape

From a Mission 66 perspective, Sagamore Hill's visitor services in 1963 left much to be desired. The TRA-era concession building had space for little beyond eating and souvenir shopping: it was certainly no substitute for a visitor center. Something would have to be done. The question was what – and where. Two distinct planning ideas emerged within the Master Plan. They were not exactly opposed, yet neither were they entirely in harmony.

One idea centered on Old Orchard, whose incorporation into the park – to quote the *Master Plan* – "poses the problem of its use."[60] The plan proposed to develop it "primarily for visitor use," including museum exhibits, an audiovisual room, and a library. It would also house the park's administrative offices."[61] In effect, Old Orchard would become a visitor center – though not *the* visitor center, for the other idea was to build an entirely new visitor center. Such a building could better serve the goals of Mission 66. Yet although Mission 66 planning principles encouraged the construction of visitor centers, it discouraged the kind of duplication now contemplated at Sagamore Hill: to have more than one visitor center, it was thought, would confuse visitors and dissipate the energy that came from gathering visitor services in one place. The proposed new building posed a more intractable problem. Given the well-established focus on recovering the estate's historic landscape, siting a new visitor center was no trivial challenge. An early draft of the *Master Plan* called for "eventual relocation of the present parking area and concession buildings [*sic*], which impose upon the historic scene."[62] This logic ruled out any site within the estate's core. But now a solution began to emerge: the new visitor center would rise on the Emlen Roosevelt property which lay just to the south. An undated (but probably slightly later) *Master Plan* draft claimed the entire plan for restoring the grounds was "contingent upon the acquisition of the W. Emlen Roosevelt property," and it committed the agency to "exert every effort to acquire

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[59] "Mission 66 Progress Report," March 1966, p. 35. For a fuller discussion of the Mission 66 visitor centers, see Sarah Allaback, *Mission 66 Visitor Centers: The History of a Building Type* (NPS: 2000); Ethan Carr, "Mission 66 and 'Rustication,'" *CRM* No. 9, 1999, pp. 16-19; and Lynn M. Jones, *The Design of National Park Visitor Centers: The Relationship Between Buildings and Their Sites* (Ann Arbor, MI: University of Michigan, 1990).

[60] *Master Plan*, September version, vol. 1, chap. 1, p. 5 (approved chapter: NMSC).

[61] *Master Plan*, September version, vol. 1, chap. 1, p. 7 (approved chapter: NMSC).

[62] *Master Plan*, September version, "Preservation and Use Objectives," p. 4 (NMSC).

this land as soon as possible before this land is sold to private developers."[63] By August 1963, the landscape restoration and visitor center components of the plan were working in harmony. The regional design office brought forth a general development plan that solved both the landscape restoration and the visitor center problems in a single, elegant equation (Fig. 16). It showed restored flower and vegetable gardens where the TRA-era parking lot stood. It also showed a new turnout from the county road, leading to a new parking area located on the Emlen Roosevelt property. On the same parcel, it showed a "Visitor Contact Station" offering "Information & Orientation, Lobby, Assembly Rm., Fee Collection, Outdoor Gathering Area, Rest Rooms, Lunching Area, Canteen & Sales." The proposed structure stood astride the new path from the parking lot to the house, so that visitors would automatically pass through it. They would then continue towards the house along a route very close to the original drive.[64] Meanwhile, new text announced the Park Service's determination, on the one hand, to "restrict modern intrusive developments to the minimum needed to handle visitation efficiently," and on the other, its pledge to remove or screen these minimal intrusions to the greatest extent possible. All of which, it concludes, "emphasizes the importance of considering the acquisition of the W. Emlen Roosevelt property…as a site for park development."[65]

On August 22, Ronald Lee signed off on Chapter 1 of the *Master Plan*, thereby recommending it for the director's approval. Entitled "Objectives and Policies," Chapter 1 contained all of the major recommendations outlined above. Yet this same Ronald Lee had accepted Eugene Taliaferro's judgment that the Emlen Roosevelt property had "nothing" to recommend it, and (setting aside his own staff's advice to purchase it) had advised Conrad Wirth to pass it by. Apparently he had changed his mind. He was not the only one. When park planner William Failor first encountered Sagamore Hill in 1961, he had looked to the estate's northern arm, known as Smith's Field, as an area for administrative and visitor services. Now, planners rejected Smith's Field[66] and looked southward. Perhaps the force and clarity of Archibald's vision had influenced their thinking. So might something that Grover O'Neill had noted: the Emlen Roosevelt property was largely flat, while the hilly terrain of Smith's Field made it a difficult site for parking. Admittedly these factors had not changed between 1961 and 1963. But something else had. First, the northern arm had been truncated by 11 acres – against the advice of planners – which curtailed the space available for a visitor contact station (not

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[63] *Master Plan*, "Package Master Plan" (SAHI version), p. 14; SAHI: CRBIB 010474. This version may date from May-June 1963 (see the subsequent discussion on pp. 83 ff.).

[64] *Master Plan*, plan volume, p. [2] (photocopy at SAHI).

[65] *Master Plan*, approved chapter, p. 4 (NMSC version).

[66] "Package Master Plan" (SAHI version), p. 15.

to mention future parking needs).[67] Second, the Emlen Roosevelt property had become available. And by the summer of 1963 its attractions had become clear to all. Even the TRA changed course. Early in August, planner Donald Humphrey and Superintendent Mullaly presented the plan to the Sagamore Hill Committee. "Maybe it would be a good idea to move the parking lot," commented Bertha Rose. She and Elisha Dyer now thought it made sense to acquire the Emlen Roosevelt property.[68] Unfortunately, the opportunity to buy it had passed. Nevertheless, in September, A. Clark Stratton approved the chapter of the *Master Plan* containing these recommendations on behalf of Director Wirth.

There was much to recommend this solution for a visitor center. Why, then, did the problematic Old Orchard proposal persist? One reason was that the building had to be put to some use. Also, the planners may have recognized that their proposal had a very slim chance of success. For all its brilliance, it depended on obtaining the very piece of property Conrad Wirth had directed his staff not to buy. Perhaps the real question was why the agency continued to develop the Emlen Roosevelt plan after losing the opportunity to acquire the property. The documents do not provide an answer. But the explanation may lie within the master planning process itself. Agency doctrine at the time directed planners for new parks to "avoid delaying approval" of master plans while extensive studies were carried out, but rather to submit their work for approval as quickly as possible: "revisions may be frequent and numerous but they should be handled as revisions of an existing plan."[69] Perhaps Sagamore Hill's planners expected to revisit a scheme whose chances of success were already looking slender.

In any case, after Lee turned down O'Neill's final offer of the four-acre segment on July 1963, there is no evidence of further discussions over the Emlen Roosevelt property. Lee did not have the funds; the TRA would not help. Perhaps the chance to buy the land passed without a great deal of hand-wringing. Yet in hindsight it appears as a turning point in Sagamore Hill's history, and for much more than the visitor center. For although having the property would not have ensured that the parking lot would be moved and the gardens recreated, *not* having it created an enormous obstacle to making these changes. And so, today, visitors continue to see the TRA-era parking lot and concession building, rather than the gardens where Edith Roosevelt cut flowers for the table.

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[67] See "Package Master Plan" (SAHI version), p. 15.

[68] Memorandum, Donald Humphrey to Ronald Lee, August 15, 1963; NARA - Philadelphia, Entry 414B, Box 43, General Correspondence 1952-1966, Folder: SAHI Exhibits.

[69] *Master Plan Handbook*, chapter 3, p. 17.

On February 8 the Service's new director, George Hartzog, reviewed the plan. At the meeting, there was "unanimous agreement that the team members had done an excellent job...." In fact, "Mr. Hartzog reacted favorably to all aspects of the plan except for the location of the administrative offices." This proved to be a significant exception. Hartzog believed that the second floor of Old Orchard was "too far removed from the public." He wanted the offices to be "readily accessible to the public because, "as a people serving [*sic*] agency park offices should be located where personnel of the park staff can easily be contacted and where they can serve the visitor best." Rather than Old Orchard, he proposed incorporating them in the "public contact facility planned outside the estate grounds." Hartzog refused to approve the plan.[70]

Much is unclear about Hartzog's decision. What made him so confident that the proposed public contact facility would in fact be built? Even if the land were acquired, would the new site be large enough to accommodate the much larger building required for administrative offices? And why did Hartzog think Old Orchard was "too removed" from the public? Did he object to the offices' second-story location? Or did he see (as George Palmer had seen in 1960, and as later park managers would confirm) that the house's site, "in an opposite direction from the old house" and invisible from it, would limit museum visitors to a fraction of total park attendance?[71]

Hartzog's verdict appears to have taken the planners by surprise. In September, his predecessor had assured Archibald Roosevelt that the agency was moving expeditiously towards implementing its landscape recommendations, while the regional office had begun to program many of them. His verdict may have been the straw that brought down the camel of the *Master Plan*. But the plan was already limping under the burden of the unresolved land issue. A handwritten annotation on one copy zeroes in on the recommended acquisition of the Emlen Roosevelt property raises questions:

> Whole property?
> Location?
> Any other property?[72]

A year after the discouraging meeting with Hartzog, Lee was pleading with colleagues in the Eastern Office of Design and Construction, and in his own regional

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[70] Memorandum, Chief, Master Plan Coordination, John A. Reshoft, to Regional Director and Chief, EODC, February 18, 1964.

[71] This long-standing pattern appears now to have been broken. Following the opening of new exhibits in January 2004 (see Chapter 6), an estimated 80% of park visitors stop at Old Orchard (information from Superintendent Gay Vietzke, February 2005).

[72] *Master Plan*, vol. I, chap. I, p. 4 (DSC version).

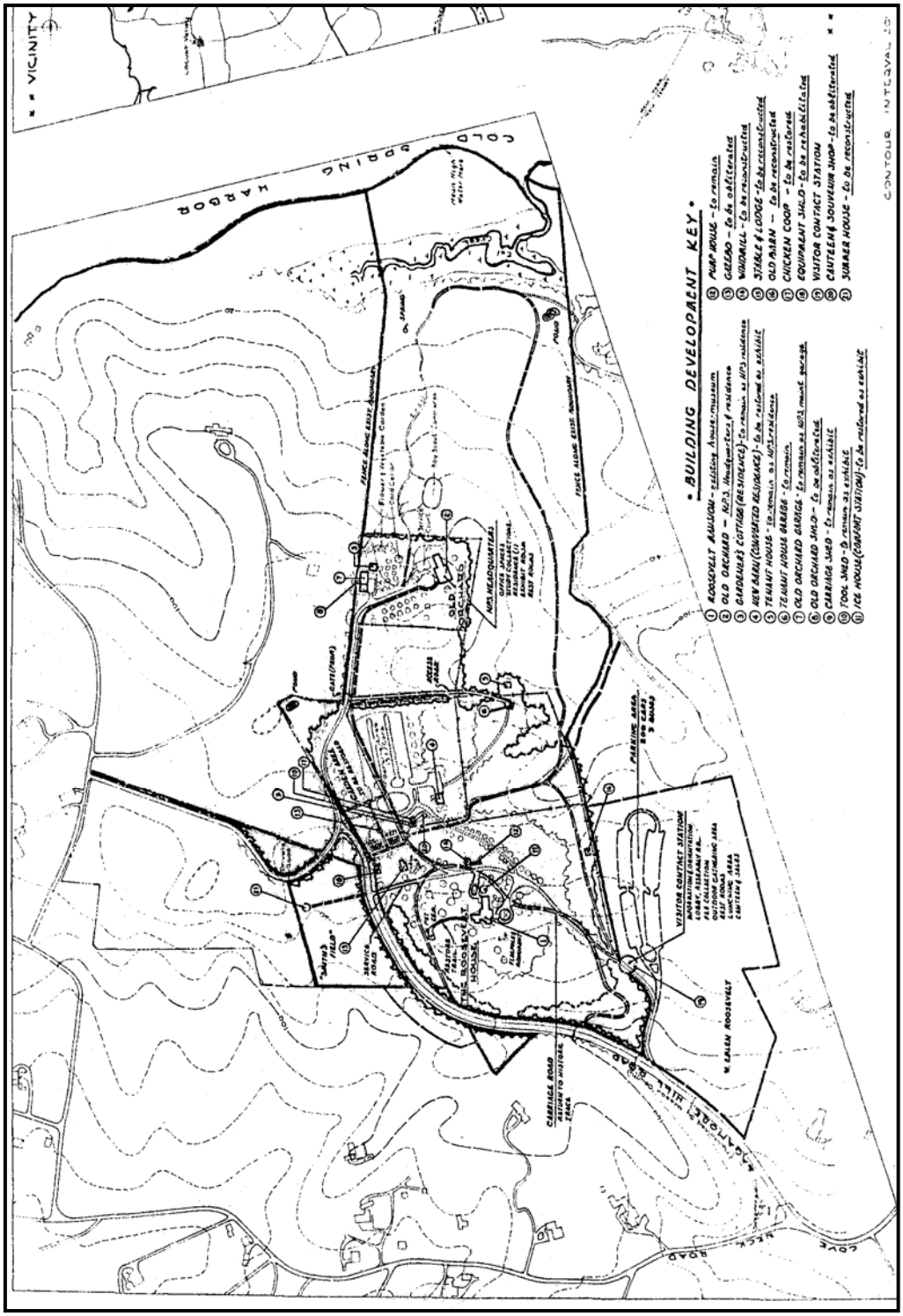

Fig.16. A detail of the 1963 General Development Plan envisions a new parking area and visitor contact station, *lower left*, and restored gardens at the core of the estate. Edith Roosevelt's Nest is shown reconstructed at a location slightly south of the original: the estate's new northern border, established by the TRA's land sale, is shown just above it. (Reprinted from 1963 *Master Plan*.)

Division of Master Plan Coordination, for a new study of the parking lot question, since the TRA had refused to buy the property for it.[73] After this, all went quiet.

Personnel changes may have assisted in the collapse of the master plan process. George Hartzog had succeeded Conrad Wirth in January 1964. Though he was knowledgeable about Sagamore Hill, he brought no longstanding commitment to it. While the park was coming into the system, Hartzog had been superintendent of Jefferson National Expansion Memorial in St. Louis. Leaving the NPS in 1962, he returned the following year as designated successor to Conrad Wirth, who had fallen out of favor with Interior Secretary Udall.[74] Presented with the Sagamore Hill plan exactly one month later, he may have wished to assert his own priorities. Meanwhile, as Hartzog was coming in, Lee was going out. He stepped down as Regional Director at the end of 1965, and though he became a "special assistant" to Hartzog, approving the plan was no longer one of his responsibilities. The park's first superintendent, Franklin Mullaly, had left in December 1964, and from that date until 1971, the park would be led by a management assistant who reported first to the superintendent of the Statue of Liberty and Castle Clinton, and then to the General Superintendent of the New York City Group. By 1965, in short, the officials with the strongest interest in Sagamore Hill's success had either left the agency or been pushed downward in the bureaucracy, while those better able to work the levers of government had other priorities.

The unfinished planning process left a confusing legacy of documents: similar (though not identical) drafts, some with signatures, some without (Fig. 17). The latest complete version of the plan, the "Package Master Plan," remained in Sagamore Hill's archive. It had an attractive cover but lacked any dates or signatures. Versions bearing signatures and dates were microfilmed by the Denver Service Center's Technical Information Center, and printed copies – including the single chapter with the full roster of signatures – survived in the library of the regional Cultural Resources Management (CRM) Division. These remained accessible to park planners and regional officials, but in the early 1990s, the CRM Division's library was relocated to the Northeast Museum Services Center (NMSC) in Charlestown, Massachusetts. This made the documents less accessible.

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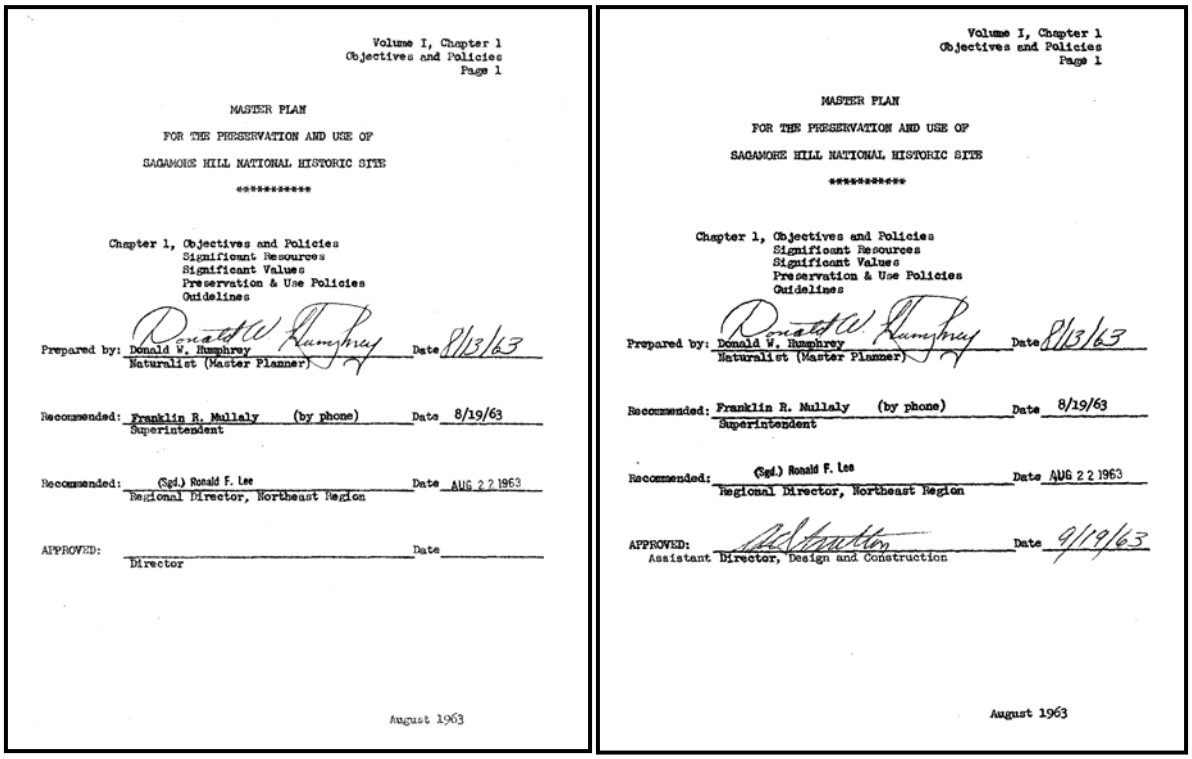
[73] Memorandum, Regional Director Lee to Chief, EODC et. al., January 18, 1965.

[74] NPS website, http://www.cr.nps.gov/history/hisnps/NPSHistory/directors.htm; consulted September 22, 2004.



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Objectives and Policies
Page 1

MASTER PLAN

FOR THE PRESERVATION AND USE OF

SAGAMORE HILL NATIONAL HISTORIC SITE

****

Chapter 1, Objectives and Policies
Significant Resources
Significant Values
Preservation & Use Policies
Guidelines

Prepared by: Donald W. Humphrey, Naturalist (Master Planner) — Date 8/13/63

Recommended: Franklin R. Mullaly (by phone), Superintendent — Date 8/19/63

Recommended: (Sgd.) Ronald F. Lee, Regional Director, Northeast Region — Date AUG 22 1963

APPROVED: Director — Date

August 1963

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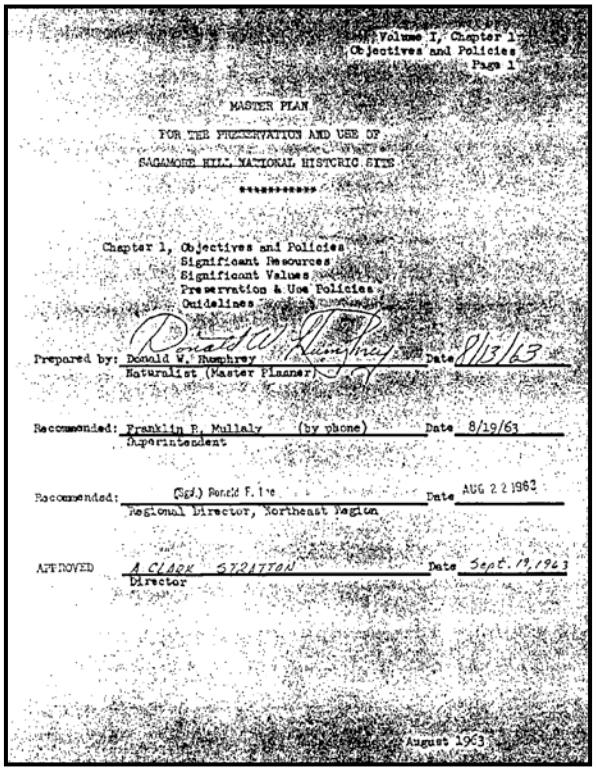
APPROVED: Assistant Director, Design and Construction — Date 9/19/63

August 1963



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Recommended: (Sgd.) Ronald F. Lee, Regional Director, Northeast Region — Date AUG 22 1963

APPROVED: A CLARK STRATTON, Director — Date Sept. 19, 1963

August 1963

Fig.17.
Three copies of the signature page for Chapter 1 of the *Master Plan*. *Top left*, the director has not yet approved. *Left,* Assistant Director Stratton's name, printed in thedDirector's signature line (a common practice with multiple copies), indicates the director's approval. *Top right*, Stratton's signature appears, but the typed text underneath the signature line has been altered from "Director" to "Assistant Director, Design and Construction." (Courtesy Sagamore Hill NHS, Northeast Region Museum Services Center, and Denver Service Center.)

Meanwhile, differing versions of the oversize material – plans, drawings, the reconstruction of the historic estate put together with Archibald Roosevelt's help, and a "General Package Narrative" – survived in Denver and in the Philadelphia branch of the National Archives. The administrative correspondence that could partially explain what happened went with the regional office's records to the Archives in Philadelphia.[75] The technical manuals of the period that could have shed light on puzzling phenomena, such as the single signed chapter, were preserved in the historical collections of the Harpers Ferry Center, but gradually disappeared from the bookshelves of park and regional offices. Little wonder that, 40 years later, some park and regional staff were confused about what had happened, some believing that the plan had been approved, others that it had not.

This critically important question – did Sagamore Hill ever have an approved master plan? – can be answered only by reference to the planning process in use at the time, which was very different from that of today. According to the process introduced in 1959,[76] master plans were to contain a rigidly prescribed sequence of sections, or units, which were to be individually prepared, submitted, reviewed, and approved. The first unit was to contain the foreword and first chapter, entitled "Objectives and Policies." Together with the second and third units, the visitor-use brief and park-organization brief, it covered the "whole park and all Service activities – protection, visitor use, interpretation, development" and provided the "whole justification" for the proposals and plans that would be described in later units. The planning process mirrored the agency's organizational structure, so that the first unit provided "guidance by the director," while the second and third reflected the regional director's supervision, and the fourth the superintendent's instructions to his staff. The units were to be prepared in sequence: first general information, next the mission, objectives, and policies (the first unit), then more detailed sections. Each had its own approval process, and

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[75] What appears to be the earliest draft, a complete version of May, 1963, is entitled "MISSION 66 Edition": its title page bears the annotation in ink "x copy (superseded)" (NMSC). An undated version called "Package Master Plan" seems to represent a revision of this plan (SAHI version). By June, the document had been recast and again titled (on the Table of Contents page for volumes two and three) "Mission 66 Edition" (NMSC version). Large sections of the Sagamore Hill version were carried over, but other passages were drawn from the May version. This new June version, however, was never completed: like the May version, the title page bears the annotation "x copy (superseded)." A similarly incomplete later revision, also titled "Mission 66 Edition," contains sections variously dated June, August, and "Revised September 1963": it is this version that contains the approved chapter. Copies are preserved at the NMSC and the DSC Technical Information Center. Sets of oversize plans also exist in Denver and in NARA-Philadelphia (with a photocopy of the latter at SAHI).

[76] The following discussion is based on the 1959 *Master Plan Handbook*, Release No. 1. The quotations are from chap. 1, pp. 11-12. See also esp. chap. 3, pp. 2, 8, 13, and 16. An example of a master plan successfully carried out under this system is that for George Washington Birthplace NM in Virginia, whose chapters are dated from 1961 to 1963 and whose title page is subtitled "Mission 66 Edition" (copy provided by History Program, Northeast Regional Office, Boston).

these, too, were hierarchically stacked. For the first chapter, the director's approval was required (following the recommendation of the superintendent, and concurrence by the chief of the regional design office and the regional director). For new parks, this initial unit was to be prepared simultaneously with volume 3, which contained a basic description of the park. This latter section did not require approval – the superintendent merely had to certify its accuracy – but for new parks, the director's approval of the first chapter had to be obtained before later units could be considered. The second and third units, on visitor use and park organization, would then go to the regional director for approval (following the superintendent's recommendation, and the design chief's concurrence); later sections required only the superintendent's approval. Drawings were prepared and recommended by the regional design office and had their own route to approval: development plans to the director, utilities plans to the regional director, management drawings to the superintendent. For base maps, the superintendent's acknowledgment was all that was required.

Holding up the surviving fragments of Sagamore Hill's master plan against this template reveals a process that was reasonably orderly until it broke down. Following a series of drafts, Chapter 1, containing the park's objectives and policies, received the regional director's recommendation in August and the director's approval in September. Here, though, there is a small puzzle. Assistant Director A. Clark Stratton signed for his own name for the director: not in itself an unusual circumstance. Nor is it particularly odd to find that, in one surviving copy, his name is printed rather than signed on the signature line. But in another copy – this one signed – the word "Director" under the signature line has been altered to read "Assistant Director, Design and Construction."[77] This copy raises some doubt as to whether the chapter actually received director-level approval. Meanwhile, Volume 3, containing general park information, was prepared in June and accepted by the superintendent in November. The historical base map was approved by the regional historian in August. The General Development Plan, however, was more problematic. Though the superintendent and the regional design chief signed it in August, it never received regional director Lee's signature, nor that of the director.[78]

Did Sagamore Hill have an approved master plan? The answer must be a qualified no. On the one hand, the concepts and policies set forth in chapter one did earn the agency's approval – if one accepts the genuineness of the director's approval. Since the procedure was to review the first section in advance of the rest of the plan, that approval, once given, must be considered definitive: that is, it was not contingent on

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[77] *Master Plan*, September version, copies in NMSC and DSC.

[78] The "Package Master Plan" version preserved at Sagamore Hill followed a different organization that was similar to that described in the 1962 *Field Guide: Package Master Plan*; NPS History Collection, Administrative Manuals, Harpers Ferry Center.

approval of other plan components, and was not compromised by the process's subsequent failure. On the other hand, the drawings and design studies needed to implement the basic policies and concepts were never approved. Thus park and regional officials were left with a clear policy mandate, but no way to carry it out.

This situation has perplexed the agency from time to time. "I find no GMP for this area," penciled one administrator on the draft of a proposed land protection plan in 1984."[79] In 1991, a new superintendent and a new curator arriving at Sagamore Hill had a similar experience: neither was aware of the plan's existence – it had disappeared from the files.[80] There were attempts to launch a new plan: murmurings in 1967 and 1969, an unfulfilled promise in 1973.[81] The need for a master plan was again recognized in the 1980s in connection with repainting the house, and yet again when the concession contract was renewed. A plan was scheduled. Further efforts followed in the 1990s. As this report is written, a planning process is, finally, underway.

The inability to complete a master plan was not responsible for the failure to restore Sagamore Hill's landscape. That was caused more by concurrent decisions concerning the park's boundaries. But the question of whether a more successful planning process might have helped salvage the agency's expansive vision is a haunting one.

CHANGES TO SAGAMORE HILL'S BUILDINGS AND LANDSCAPE

Plan or no plan, Sagamore Hill's new guardians in 1963 faced a long list of maintenance requirements that had to be attended to rather quickly. The Theodore Roosevelt House needed work. Lawns needed mowing, trees pruning. A plugged septic tank needed fixing, while the emergency fire-fighting pump at the Theodore Roosevelt House had been out of service for over a year. Utilities had to be checked, the entrance road required patching, and the park needed a new sign. Repairs were in progress at the New Barn. The most important and long-lasting of these maintenance campaigns are covered in Chapter 4.

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[79] "Draft Land Protection Plan," n.d. [but identical copy without annotations dated 1984], p. 1; NPS Planning Program Files, Washington, D.C., Folder: Land Protection Plan.

[80] Amy Verone, interview with the author, February 4, 2004.

[81] "Perhaps, we should write a memo to the Superintendent, New York City Group, recommending that when the new Master Plan for Sagamore Hill is prepared...." (Memorandum, John Bond to Chief Historian, July 14, 1967); "...under the new policy announced by the Director, Master Planning should not proceed until the Basic Data studies have been completed. We hope to schedule the Sagamore Hill Basic Data study for the 1970 fiscal year" (Memorandum, Chief Historian Robert M. Utley to Chief, Division of Planning and Interpretive Service, April 29, 1969); both NPS Library. "The Master Plan team should definitely be here in fiscal year 1974" (Annual Report, 1973), p. 7; Harpers Ferry, SAHI Box: Misc.

The park's new guardians also brought their own ideas for reshaping the park. Many were elaborated in the *Master Plan*, and as early as the fall of 1963 the agency began to put these into effect. The most important concerned Old Orchard Museum, Gray Cottage, and the Theodore Roosevelt House. But even the landscape received some attention, despite the confused outcome of the *Master Plan*. Throughout the park, the early years of NPS stewardship were marked by initiatives that – although they did not greatly affect its physical fabric – altered the way it was presented, interpreted, and managed.

Old Orchard Museum

If park planners saw Old Orchard as an achievable substitute for a new visitor center, they were right. By the fall of 1963, officials including Regional Museum Curator Horace Willcox were at work on a prospectus for adapting Old Orchard as a visitor center – "as requested by Regional Director Ronald F. Lee."[82] The idea was to provide a "central interpretive facility" where "the story can be brought sharply into focus for the visitor" through "special exhibit panels, dioramas, and audio." Key to the plan was the relocation of exhibits from the third floor of the Theodore Roosevelt Home, first proposed by Mrs. Rose in 1960. There would also be administrative offices and storage space for Roosevelt memorabilia and, finally, a "meeting room for organizations, such as the Theodore Roosevelt Association."[83] There was another dimension. The TRA felt that Old Orchard was historically significant as the home of Theodore Roosevelt, Jr., and so museum planners decided to return portraits and furniture then in storage to the exhibit rooms so that visitors would perceive the house as "the residence of a distinguished American citizen."[84]

The new visitor center/museum was clearly a high priority for the regional office. With about $6,000 available for the new exhibits, the office agreed to stretch the budget by paying for the time contributed by Regional Museum Curator Horace Willcox ($1,000) and the exhibit designer.[85] The association's advisory committee was also

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[82] Memorandum, Chief, Division of History & Archeology to Assistant Regional Director, CIU, accompanying visitor center prospectus, January 6, 1964; SAHI: CRBIB, Box No. 2.

[83] M.H. Nelligan, F. Barnes, and H. Willcox, *Prospectus for "Old Orchard" Visitor Center* [draft] (Oyster Bay, NY: U.S. DOI, NPS, Sagamore Hill NHS, December 1963), p. [1]; SAHI: CRBIB Box No. 2.

[84] Memorandum, Superintendent Franklin R. Mullaly to Lee, November 26, 1963; NARA - Philadelphia, Entry 414B, Box 43, Folder: SAHI Exhibits.

[85] Memoranda, Chief, Eastern Museum Laboratory, Russell J. Hendrickson to Ronald Lee and Lee to Hartzog, August 24 and September 2, 1964; NARA - Philadelphia, Entry 414B, Box 43, Folder: SAHI Exhibits.

closely involved in exhibit planning, and Willcox was "much taken by their cheerful attitude and verve and unqualified sincerity."[86]

Willcox and his colleagues appear to have prepared two alternate draft proposals early in 1964, of which only one has survived[87] It must have been the more ambitious of the two. It called for audiovisual and meeting rooms on the first floor, exhibition rooms on both first and second floors, and it put the park offices in the kitchen or servants' wing, along with exhibit preparation, audiovisual maintenance, and museum storage spaces. In the end, however, exhibits were limited to the ground floor, park offices went upstairs, and the servants' wing was rehabilitated for staff housing. But the basic approach to telling the story was that outlined in the *Prospectus*. The exhibits would support the park's effort to present "a well-rounded" picture of "the man – Theodore Roosevelt – his character and accomplishments." They would place "special emphasis on the family life at Sagamore Hill." Audiovisual presentations would supplement the exhibits, drawing particularly on the "wealth of historical movies" – i.e., original film footage – available.[88]

Early talk of having the exhibits ready by the opening of the New York World's Fair in 1964 was dismissed as impractical, though at the request of the TRA's Advisory Committee, some temporary exhibits seem to have been installed late that year.[89] Old Orchard formally opened to the public in 1966, and its exhibits remained essentially unchanged, albeit increasingly deteriorated and criticized, until they were replaced in 2004.

The Theodore Roosevelt House

The development of Old Orchard as a museum had repercussions within the Theodore Roosevelt House. Without the need for museum displays in the house, it now became possible to refurnish the TRA's third-floor exhibit spaces as period rooms (Figs. 18, 19). Early that year, architect Norman Souder prepared a historic structures report covering the so-called School Room, Linen Room, Serving Room, Trunk Room, maid's and cook's rooms, and one family bedroom. Historian Robert K. Rheinish followed with

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[86] Memorandum, Willcox to Chief, Division of History & Archeology, March 9, 1964; NARA - Philadelphia, Entry 414B, Box 43, Folder: SAHI Exhibits. Willcox's comment referred to the park's staff as well as the advisory committee.

[87] Management Assistant John Townsley referred to two drafts in a memorandum of February 13, 1964, to Superintendent, NYC NPS Group; NARA - Philadelphia, Entry 414 B, Box 43, Folder: SAHI Exhibits.

[88] *Prospectus*, pp. 4-5.

[89] Memorandum, Regional Museum Curator Horace Willcox to Chief, Division of History and Archeology, March 9. 1964, and Chief, Eastern Museum Laboratory, Russell J. Hendrickson, to Regional Director, August 24, 1964; NARA - Philadelphia, Entry 414B, Box 43, Folder: SAHI Exhibits.

a refurnishing plan.[90] Restoring the rooms, noted Souder, would help "interpret the family life of the Roosevelts together with that of their house servants." By reinstating the original corridor to the two servants' bedrooms, Souder was able to restore them to their original size and shape. But the stairway inserted by the Roosevelt Memorial Association could not be removed, and its presence made it impossible to restore the "schoolroom" to anything like its original size and shape. The family bedroom also could not be made quite right.

Complete accuracy in the furnishings was elusive, too; indeed the refurnishing plan's stated goal was only to "approximate" the rooms' appearance during Roosevelt's presidency. But the reasons were different. Documentary evidence for the third floor was scant. There was an inventory of furnishings compiled in 1919, and there were people who might remember their early appearance. In 1962, a Park Service historian had walked through the house with Roosevelt's daughter Ethel Derby and a portable tape recorder – a device then less common than now – and had created a two-hour tape of her reminiscences, a richly textured account of family life remembered from childhood. Historian Ingersoll, who carried out the interview, believed he had captured "some new material," as well as "some which repeats information already known and verified, and also some which contradicts the recollections of others about Sagamore Hill."[91]

Rheinish's furnishing plan drew from the tape, as well as from interviews with Archibald Roosevelt, Theodore's cousin Nicholas, Bertha Rose, and Elisha Dyer. The information was good enough for Rheinish to promise that, when the upstairs rooms were completed, the entire house would "accurately portray" the conditions of Roosevelt's time. Mrs. Rose, however, remarked that "it was necessary, in some rooms, to use a little imagination...."[92] For Theodore Roosevelt, Jr.'s bedroom, according to Rheinish, Mrs. Derby had selected wallpaper "approximating the original"; for the "schoolroom," wallpaper "of a similar pattern to that historically used." When she saw two school desks in an antique shop that reminded her of the ones she remembered in the schoolroom, the TRA bought them.

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[90] Norman M. Souder, *Historic Structure Report, Part II (Portion). Architectural Data Section on Restoration of Third Floor Rooms*, January 1966, p. i; SAHI: CRBIB, Box No. 7. Also Robert K. Rheinish, *Furnishing Plan, Third Floor Sagamore Hill*, May 1966, p. [1]; SAHI: CRBIB, Box 12. For the TRA's approval, see also Memorandum, Donald Humphrey to Ronald Lee, August 15, 1963; NARA - Philadelphia, Entry 414B, Box 43, Folder: SAHI Exhibits.

[91] Memorandum, Melvin J. Weig (Superintendent, Edison Laboratory NM) to Ronald Lee, May 25, 1962; NARA - Philadelphia, Box 6, NPS Northeast Office Administrative Correspondence 1953-68, Folder: Sagamore Hill 9/61-4/64. A transcript of the tape, "Interview with Mrs. Ethel Roosevelt Derby at Sagamore Hill," is at NMSC, CRBIB SAHI.015c.2 401550.

[92] Mrs. Reginald P. Rose, "The Sagamore Story," in *Sagamore Hill* (brochure), n.d. p. 8; SAHI - Interpretation Files, Folder: Educational Materials.

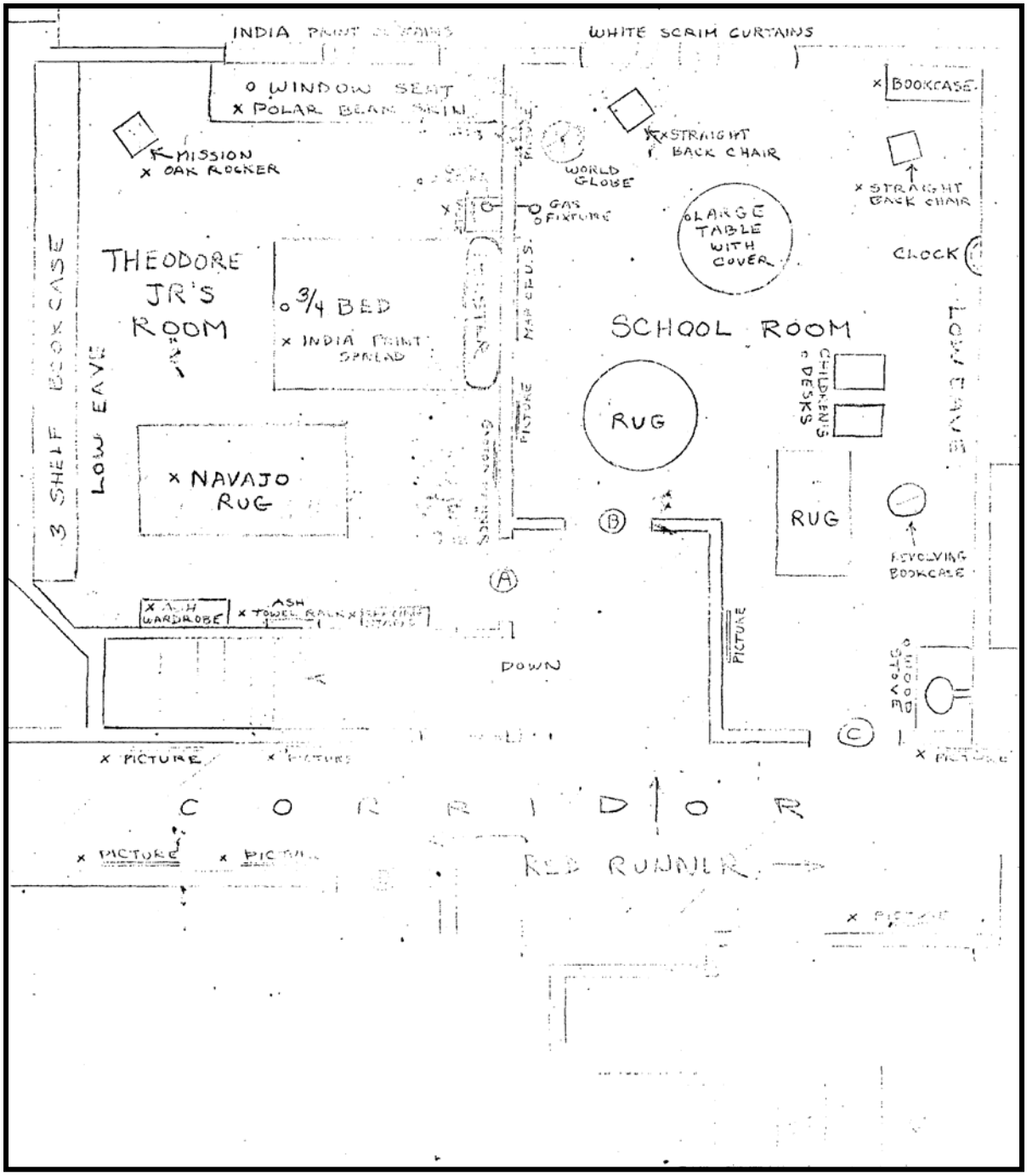

Fig. 18. Third floor School Room and bedroom as refurnished after removal of museum exhibits in 1966. (Reprinted from Robert K. Rheinish, *Furnishing Plan, Third Floor Sagamore Hill*.)

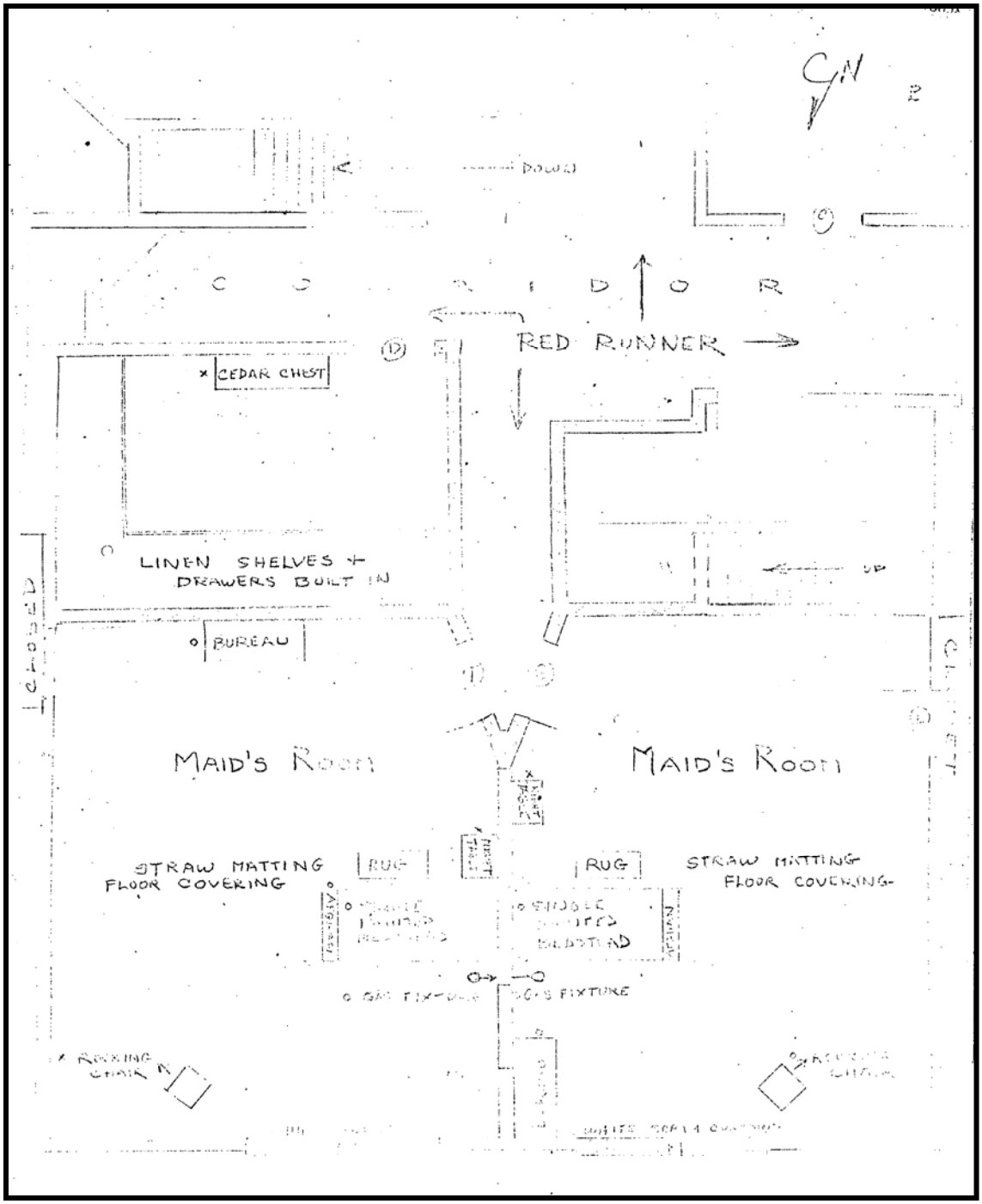

Fig. 19. Maids' rooms and corridors on third floor of Theodore Roosevelt House, as restored after removal of museum exhibits in 1966.

The greatest interpretive leap was the decision to furnish this room as a schoolroom at all. Mrs. Derby and Archibald Roosevelt believed they had used the room for that purpose during the winters of 1899 and "possibly" 1900. Later, Theodore Roosevelt, Jr., might have been tutored there during the summers.[93] But for most of the presidential years, the room had been used for other things. Though important to the TRA and Roosevelt descendants, the school room's connection with the presidential years – the stated focus of interpretation for both the association and the National Park Service – was weak.

The Furnishing Plan of 1966 gives no hint of conflict. But tension there was. Visiting the park in March of that year, an NPS staff architect told Ronald Lee that site manager John Townsley had felt pressured by Mrs. Derby and Mrs. Rose into accepting certain furnishings for the third floor and, indeed, "its [*sic*] a touchy situation if he doesn't." Not only was the association "very anxious" to have the work done but, reported historian Frank Barnes (visiting to supervise the installation of his exhibit plan), Superintendent Townsley was "afraid they will be most unhappy if the work is <u>not</u> accomplished...." So nonplused was Townsley, according to Barnes, that he was "a little rough" on the project architect, who took an eminently professional approach to issues such as the location of radiators and seemed oblivious to "the sensitive spot in which Townsley finds himself" in matters even as small as this. "I don't know what can be done about it," Barnes concluded,

> but the Theodore Roosevelt Association does seem to take an "over active" interest in Sagamore Hill developments, and somehow they've got to be discreetly reminded of National Park Service procedures (such as Furnishings Plans, Exhibit Plans, etc.). Perhaps there can be some diplomatic maneuvering at the forthcoming meeting of the Theodore Roosevelt Association.[94]

In the meantime, the Furnishing Plan was submitted to Mrs. Rose and Mrs. Derby, whose approval was noted in the final document.

Gray Cottage

Another major building initiative focused on Gray Cottage (fig. 20). Sagamore Hill's transfer to the National Park Service meant that it would gain a full-time resident site manager, and Gray Cottage was to become his residence. There was urgency about getting the house ready. Built in 1910 for two devoted White House servants, Gray Cottage was a small, two-story frame house sheathed in clapboard, in design and

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[93] Rheinish, *Furnishing Plan, Third Floor, Sagamore Hill*, pp. 4, 6.

[94] Frank Barnes, Trip Report to Regional Director, March 16, 1966; NARA - Philadelphia, Entry 413, Box 3, Folder: NY Area Trip Reports 1963-1968.

construction "just about the minimum standard for the period in which it was done."[95] Over the years, small changes had been made, many during the 1950s when the TRA renovated it for staff use. The question was: Could it be expanded into a three-bedroom house? Regional Architect John Lukens decided it could. "We know that you would like to see this work move ahead without delay," wrote a staff member to Ronald Lee upon hearing the good news.[96] In the interests of speed, Lukens suggested that he be allowed to do all of the architectural work himself. While the Eastern Office of Design and Construction would pay for the actual work, this meant that the regional office would assume the cost of plans, specifications, and bid advertisements, and would also relieve Lukens temporarily of other responsibilities. All of this was done. In the meantime, Lukens had other ideas for streamlining the process. Since Gray Cottage was a historic structure, the rules required preparation not merely of a preliminary drawing, but of the architectural data section of a historic structures report. Noting, however, that Gray Cottage had not yet been added to the Historic Structures Inventory, Lukens suggested that this could follow later.[97] In fact, the basic renovation drawings were completed for the addition on February 6 and approved by Lee the following day. They showed a new two-story addition containing a dining room and a third bedroom at the back of the house, where it was invisible to the public (Figs. 21-22). The *Historic Structures Report* followed in April. By June a contract had been awarded, and Lee requested Director Hartzog's approval – by wire or telephone, if possible. The work would cost about $20,000 – potentially a problem, since the regional office had estimated only $16,000.

However, Lee calculated that about $6,500 of the total cost would have been spent anyway on "historic rehabilitation," which brought the construction cost down to $14,252, well below the estimate.[98]

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[95] John A. Townsley and John B. Lukens, *Historic Structures Report, Part I:The Grey Cottage (*U.S. Department of the Interior, National Park Service, April 1964), "Architectural Data Section," p. 2; SAHI Central Files H 30, Folder: Gray Cottage.

[96] Memorandum, Assistant Regional Director J. Carlisle Crouch to Ronald Lee, December 11, 1963; NARA - Philadelphia, Box 9, Entry 414, 1953-64.

[97] Memorandum, Lukens to Chief, Division of Operations and Maintenance, December 9, 1963; NARA - Philadelphia, Box 9, entry 414, 1953-64.

[98] Drawings, *Historic Structures Report, Part I, The Gray Cottage*; SAHI: CRBIB, Box No. 7. Memorandum, Lee to Hartzog, June 12, 1964,; NARA - Philadelphia, NPS Northeast Office 1953-68, Administrative Correspondence D-22, Box 22, Folder: SAHI.

Fig. 20. Gray Cottage: view in 1964. (Photograph courtesy Sagamore Hill NHS.)

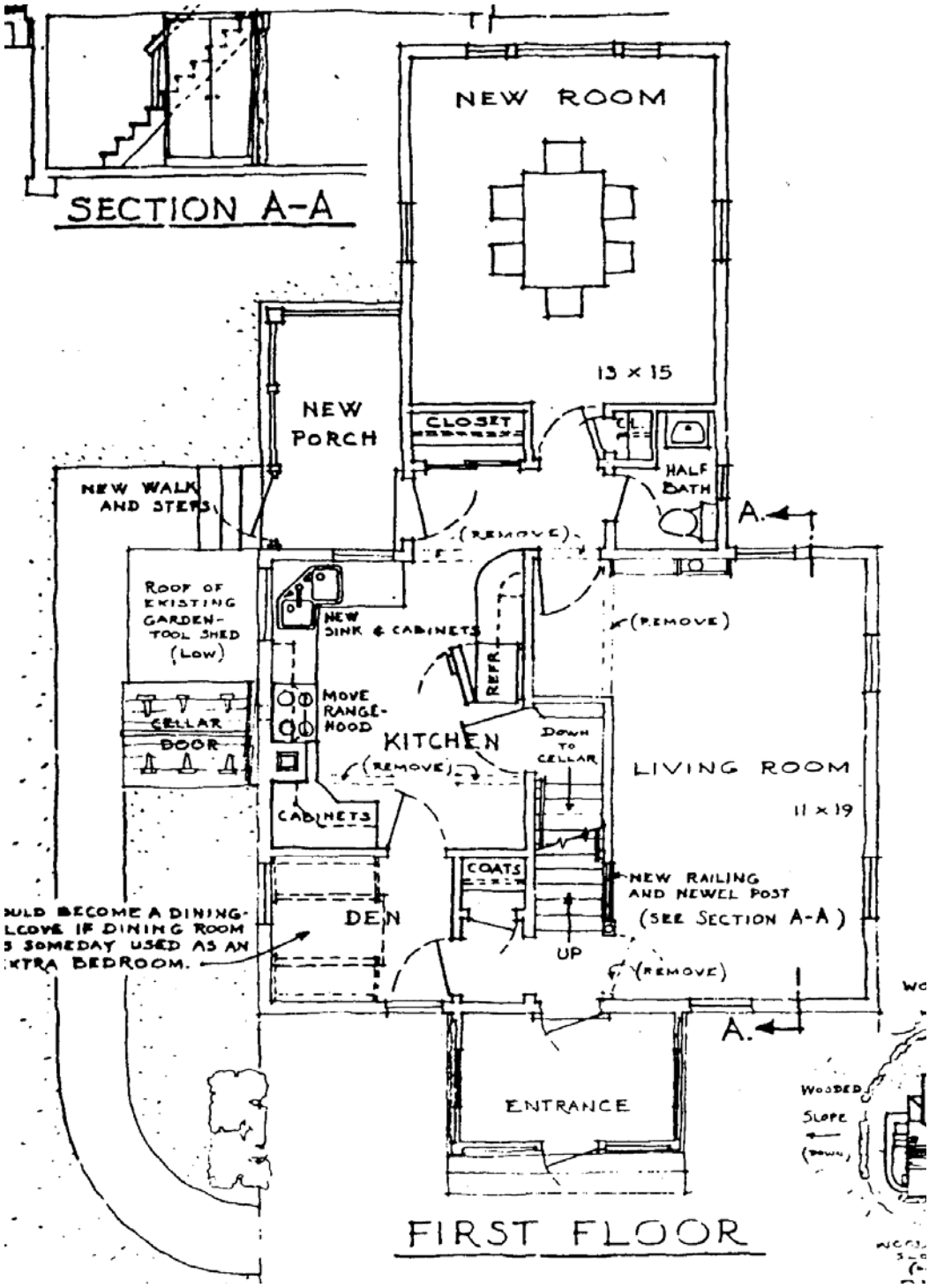
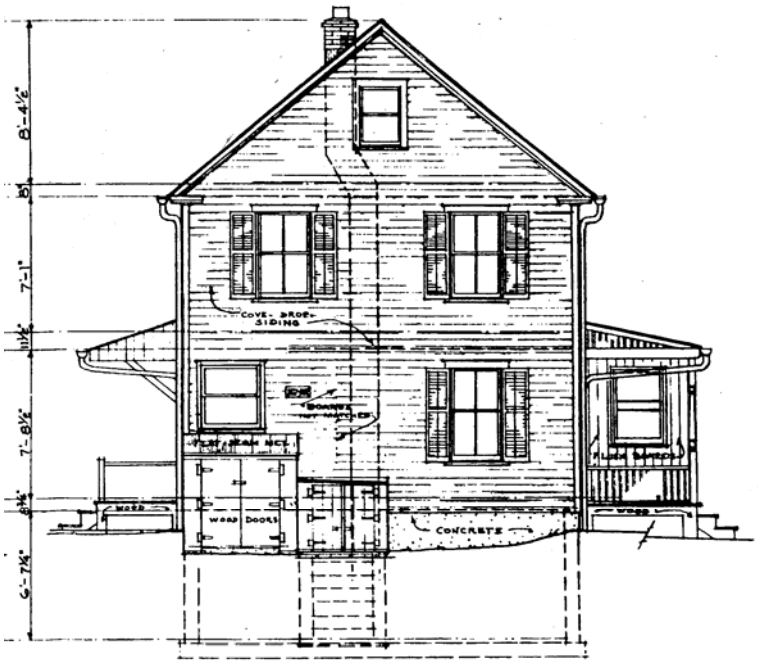
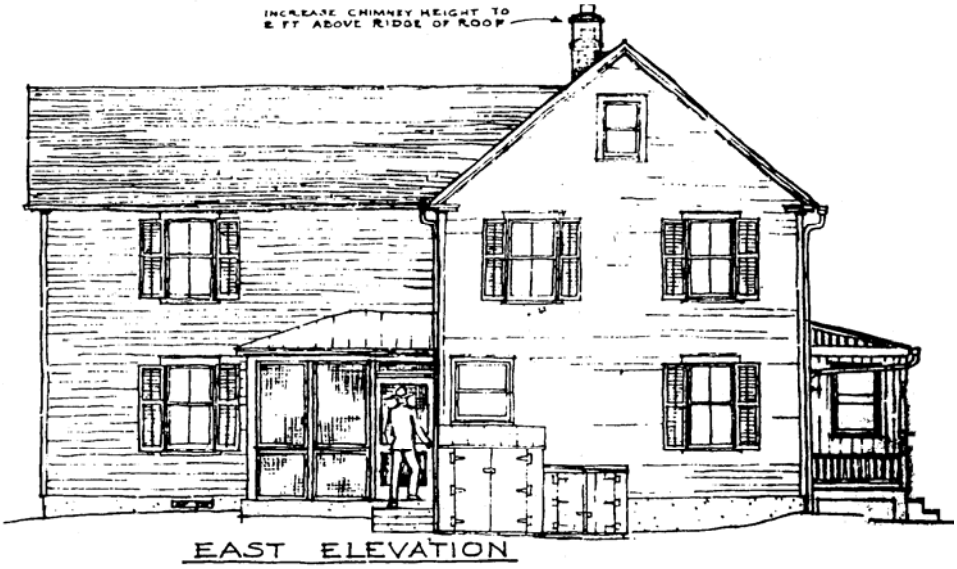


Fig. 21. Gray Cottage first floor plan of proposed addition. (Reprinted from John A. Townsley and John B. Lukens, *Historic Structures Report, Part I, The Gray Cottage*, Architectural Data Section.)



EAST ELEVATION



EAST ELEVATION

NOTE:- NORTH (FRONT) ELEVATION,
NO CHANGE FROM EXISTING.

Fig. 22. Gray Cottage: *top*, as existing in 1964, and *above*, with proposed addition. (Reprinted from Townsley and Lukens, *Historic Structures Report, Part I, The Gray Cottage*, Architectural Data Section.)

A Restored Landscape

Finally, there was the landscape. Confident of the *Master Plan*'s approval, the regional office began in the fall of 1963 to program its landscape components. According to planning theory, "programming" followed the preparation of a master plan (Fig. 23), selecting items from the plan and scheduling their accomplishment through tools such as work schedules, project construction proposals, fiscal year programs, and staffing and funding schedules.[99] With Director Wirth assuring Archibald Roosevelt that the National Park Service expected to "work toward" the plan's recommendations "as rapidly as possible,"[100] a work schedule and Project Construction Proposals were prepared for an ambitious program that included a new trail to the beach, reconstruction of the Stable and Lodge, restoration of the grounds, and relocation of the canteen and souvenir shop.[101]

PROJECT	MOUNT IN PCP	CONSTRUCTION AMOUNT IN WORK SCHEDULE	TOTAL ESTIMATE IN WORK SCHEDULE
Service Road and Harbor Trail	$20,000		
Administration Building and Museum in Old Orchard, Exhibits	$40,000	$35,900	
Rehabilitation of Estate Buildings	$15,000	$30,900	
Restoration of Grounds	$25,000		
Reconstruction of Coach House and Lodge (i.e., Stable and Lodge)	$50,000	$41,500	$50,000
Relocation of Canteen and Souvenir Shop	$40,000	$33,200	$40,000
Grounds Development	$25,000	$20,800	

Graph Source: Landscape Restoration Projects Planned in 1963 (from schedule of construction projects, August 1963, and Project Construction Proposals (NARA - Philadelphia, NPS Northeast Office Records).

[99] *Master Plan Handbook*, chap. 1, pp. 2-3.

[100] Letter, Conrad Wirth to Archibald Roosevelt, September 18, 1963; NPS Library.

[101] Memoranda, Regional Chief, Program Coordination, to Superintendent, September 10, 1963, and Chief, EODC, to Superintendent, September 17, 1963, with attached schedule of construction projects, August 1963; NARA - Philadelphia, NPS NE Office, Gen Corres 1952-63, Entry 68-0636, Box 63.

All of this work was to be carried out by private contractors, under the supervision of the Eastern Office of Design and Construction. But given the collapse of the master planning process, it is hardly surprising that none of the projects that involved significant change to the park's layout was ever begun.

Small progress was nonetheless made towards landscape restoration. In 1968, 32 acres of land between Old Orchard and the beach were designated a Natural Environmental Study Area, and a mile-long nature trail was constructed. This was essentially an educational initiative: it is discussed below. There were the outbuildings. Why the long-vanished windmill was chosen from the list of structures awaiting reconstruction or restoration is unclear. It may have been because it had been a cherished project of the TRA, abandoned in 1956 before it could be carried out.[102]

In 1970, in any case, historian Francis Wilshin prepared a research report on the historic windmill; plans were drawn up and placed before the association for review; and by 1971 a new windmill was under construction. It was not an exact replica: it had proven impractical to reconstruct the original wooden wheel, so a reasonable approximation was made of metal.[103] Interest in landscape restoration also prompted the collecting of data. There was some thought in the later 1960s that a new master plan was to be prepared: the process would have to begin with a basic data study, and this would also be essential for a proper landscape restoration. Historian John Bond worked on such a study in 1967 and discovered a flaw in the 1963 *Master Plan*: it lacked a clear "date of emphasis for restoration or interpretation."[104] Donald Humphrey, the plan's lead author, explained to him that Ronald Lee had "wanted to emphasize the continuous history of the estate." All very well, replied Bond, but not a practical principle for restoration. After all, "if some feature is to be restored it must be restored to a given period." Unfortunately, Bond warned, the *Master Plan*'s imprecision could prompt clashes among administrators preferring different dates of restoration. Bond himself was working on a historical base map. While his accompanying narrative would cover 1880 through 1919, he needed a target date for the map, and he proposed 1909 as the "most representative date of Roosevelt's occupancy."

By 1970, Bond's basic data report and base map had been assigned to historian Francis Wilshin, who was eager to hear what surviving family members might remember of the estate. Archibald continued to help. Wilshin also wrote to Archibald's sister, Alice

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[102] See TRA Papers, Box 9, Folder 12 "Historic Windmill."

[103] Memoranda, Superintendent, Fire Island & NYC Group, to Regional Director, September 24 and December 23, 1970; and Director, Eastern Service Center, October 6, 1970; Frank Barnes to Regional Director, January 8, 1971; letter, Conrad Wirth to Jerry Wagers, December 21, 1970; Memorandum, Civil Engineer George Lucko to Superintendent, Fire Island & NYC Group, April 13, 1971; NPS Library.

[104] Memorandum, Historian John W. Bond to Chief Historian, July 14, 1967; NPS Library.

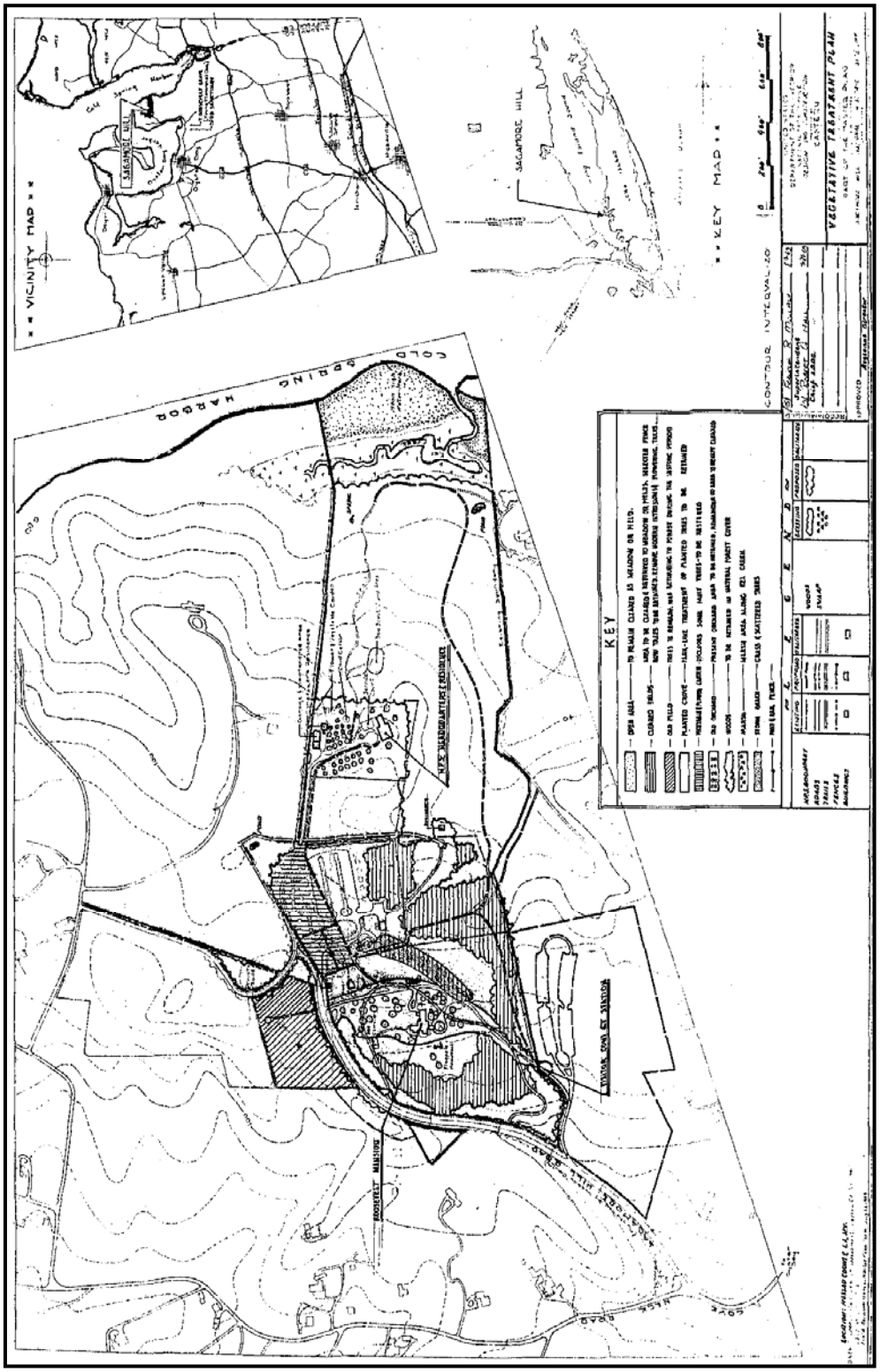

Fig. 23. The Vegetative Treatment Plan of 1963 shows extensive areas to be cleared and restored to meadow or field, as well as restored gardens. The southern portion of Smith's Field (the estate's northern arm) is shown as a forested buffer. (Reprinted from 1963 *Master Plan*.)

Roosevelt Longworth.[105] Unfortunately, Wilshin may not have been the best person to take on the project. He had been historian and superintendent at Manassas, but had been transferred to Washington the previous year after his too-zealous defense of the park had politically embarrassed the agency.[106] Wilshin was nearing the end of his career: two years later he would retire, leaving the report almost, but not quite, finished. This caused some annoyance over such things as a missing bibliography, but there was a deeper disappointment. Management Assistant Betty Gentry, now in charge of Sagamore Hill, complained to Supervisory Historian Edwin Bearss: "...members of my staff were under the impression that this was to be a grounds resource study. If that is the case, we feel that there is a definite omission of information about the grounds...," particularly the areas immediately surrounding the Theodore Roosevelt Home and Old Orchard.[107] Bearss passed the report up the chain. It was all "regrettable," he said, but there was nothing to be done about it: certainly *his* office was much too busy to fix the problems.[108]

And so Sagamore Hill's landscape plans hit another obstacle. After this, little further attention would be paid to the landscape or the outbuildings for a decade: it would be two decades before park planners once again considered the question of restoring the historic layout – and then not to carry out the *Master Plan*'s recommendation, but to study it all over again.

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[105] Letter, Francis F. Wilshin to Mrs. A.L.R. Longworth, February 4, 1970; NPS Library. Wilshin enumerated the points to be established relative to the base map: "the appearance and location of the dwelling, barn, stable, outbuildings, and other structures; the character and location of fences – of roads, bridle trails, and paths; the relationship of wooded areas to open fields, and open fields to cultivated fields; crops and their methods of rotation; inventory of farm machinery and transportation vehicles; location and installation of utility lines; location and information data on the vegetable garden, the flower garden and the orchard; the planting of trees and shrubs; the location of the tennis court and the rifle range; the addition of the North Wing to Sagamore Hill and its impact upon the family life; the construction of the new barn and the double service of the 'old barn' in functional use and recreation; the erection of the new wind mill; the relative number of horses, cows, pigs and chickens that were maintained; the location of the 'summer house' and the pet cemetery; and the names and kinds of pets."

[106] See Joan M. Zenzen, *Battling for Manassas* (University Park, PA: Pennsylvania State University Press, 1998), *passim*.

[107] Memorandum, Sagamore Hill Management Assistant Betty T. Gentry to Supervisory Historian Bearss, September 7, 1972; NPS Library.

[108] Memorandum, Bearss to Manager, Historic Preservation Team, DSC, September 18, 1972; NPS Library.

INTERPRETING SAGAMORE HILL

Ronald Lee had a theory about how new parks evolved. They began, he said, with investigation and authorization, continued through acquisition and protection, and led finally to the "interpretation stage."[109] This evolution represented progress in more than one sense. Lee, who had directed the Division of Interpretation before becoming regional director, believed interpretation was "the final predominant public use that in many ways justifies the park."[110] And as a former Chief Historian, he was particularly aware of the special role that interpretation played in historical areas.

At Sagamore Hill, despite the failure to build the expected visitor center, work moved forward quickly on other interpretive projects: new exhibits and audiovisual facilities at Old Orchard, an interpretive prospectus (promised for 1964[111] but completed in 1970), new leaflets for the Theodore Roosevelt Home and Old Orchard, a room guide to the house, and an information kiosk. The Theodore Roosevelt Association reprinted Hermann Hagedorn's handbook of 1953.[112]

The interpretive machinery described by the *Master Plan* was fairly straightforward. The park was to be an "exhibit-in-place" – that is, something that people walked around and looked at. But this was to be supplemented by personal services, orientation, background information, and museum exhibits and audiovisual displays at Old Orchard. Focusing more closely on the problem early in 1964, staff and planners agreed that an "ideal plan of interpretation would allow visitors to see a short audiovisual introduction, then see Sagamore Hill and finally look at enriching exhibits at Old Orchard."[113] The *Interpretive Prospectus* elaborated, imagining a visitor experience richly supplemented by guided tours of the house, scheduled and impromptu talks, an Acoustiguide program, signs both inside the house and around the grounds, a large new visitor center, and even "living history" in the form of costumed interpreters.

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[109] Lee, "Comments on the Role of Interpretation in the NPS," pp. 2-3.

[110] Lee, "Comments on the Role of Interpretation in the NPS," p. 4.

[111] Memorandum, Supervisory Historian/NYC Group Thomas Pitkin to Regional Director, January 9, 1964; NARA-Philadelphia, Entry 414B, Box 43, Folder: SAHI Exhibits.

[112] Brochures: Northeast Regional Office, Boston, Files of the History Program. They are undated, but that for the house is referenced in the *Interpretive Prospectus: Sagamore Hill National Historic Site, New York* (U.S. DOI, NPS, 1970), p. 18. Room guide: *Sagamore Hill Welcomes You! A Room Guide...*, 1968; Harpers Ferry Center. Hagedorn's *Guide to Sagamore Hill: the Place, the people, the Life, the Meaning* was reprinted in 1967 (New York, NY: TRA, 1953). The kiosk was built in 1968.

[113] Memorandum, Chief, Eastern Museum Laboratory, Russell J. Hendrickson, to Regional Director, August 24, 1964; NARA - Philadelphia, Entry 414B, Box 43, Folder: SAHI Exhibits.

Within this spectrum of resources and techniques, the emphasis given to audiovisual presentations is noteworthy. Like the emphasis on visitor centers, this was a legacy from Mission 66, which had funded a great expansion in their use throughout the park system. It was also something Ronald Lee had favored.[114]

Related to it was a strong interest in oral history. Already in 1962, park historian Ingersoll had recorded Ethel Roosevelt Derby walking through the house: Murray Nelligan, chief of the History and Archeology Division (and soon to be co-author of the Old Orchard *Prospectus*), thought he had unearthed "much material...useful for interpretive purposes." Nelligan had "particularly liked his emphasis on family activity and how the Roosevelt children saw things."[115] Park officials were soon gathering information from Archibald Roosevelt as well, and by 1970, Historian Wilshin was interviewing Alice Roosevelt Longworth. That year, the *Interpretive Prospectus* announced that the Acoustiguide Company would create high-quality recordings of all three, "primarily for use with the Acoustiguide tour" but also for use at audio stations to be scattered around the park.[116] Ethel Derby did produce a tape: her distant relative, Eleanor Roosevelt, had produced the first such narration for the NPS at the Home of Franklin D. Roosevelt National Historic Site in 1963.[117] No one had yet thought to interview Sagamore Hill's servants, but the *Interpretive Prospectus* suggested that an oral history research project should interview employees: their stories could "fill in gaps," while their knowledge of parts of the estate like the grounds and servants' quarters came from a "different, yet useful perspective."[118] The servants were aging: this should be done quickly.[119]

To provide all of this would not be cheap. The *Interpretive Prospectus* projected capital costs of $65,500, including $15,000 for a 10-minute movie to be shown in the proposed reception center, $12,000 for outdoor interpretive markers, and $4,800 for audio-message repeaters to be installed around the park.[120] The *Interpretive Prospectus* also included a staffing plan: its central recommendation was to hire six new park

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[114] Barry Mackintosh, "Interpretation in the National Park Service: A Historical Perspective," History Division, 1986," pp. 38-45; Lee, "Comments," 1961, e.g., p. 10.

[115] Memorandum, Chief, Division of History and Archeology, Murray H. Nelligan, to Superintendent, Edison Library, June 4, 1962; NARA- Philadelphia, Box 6, NPS Northeast Office Administrative Correspondence 1953-68, Folder: Sagamore Hill 9/61-4/64. The transcript of Ingersoll's interview, "Interview with Mrs. Ethel Roosevelt Derby at Sagamore Hill," is at NMSC, CRBIB SAHI.015.c2 401550.

[116] *Interpretive Prospectus*, p. 12.

[117] Mackintosh, "Interpretation in the National Park Service," p. 40.

[118] *Interpretive Prospectus*, p. 19.

[119] The recommended interviews with servants do not seem to have been carried out.

[120] *Interpretive Prospectus*, p. 22.

aid/technicians to staff the reception center, the Theodore Roosevelt Home, a school-group program, and a Roosevelt Conservation Center.[121]

The story all of this was designed to tell was essentially simple. It was the story of "one of America's great men," but it was a story "humanized" with "family picnics, romps with the children, horse-back riding, target shooting, hiking, swimming, boating, and reading."[122] It was a story, in other words, that leaned towards personal anecdote and away from global issues. Describing Sagamore Hill as "HOME OF A GREAT AMERICAN FAMILY," the park's new brochure remarked that "People talked about a man never too busy being President to be a devoted father to his four boys and two girls, and a boon companion to countless friends."[123] The exhibits at Old Orchard supported this picture, with an introductory display that gave as much emphasis to Roosevelt's wife and children as to the great man himself and a generous presentation of family "romping, camping, hiking," and so forth.[124] Wilshin's interviews revealed a similar absorption in anecdote: "Life at Sagamore Hill...must have been an altogether delightful experience," he gushed to Alice Roosevelt Longworth. "Among other things we are anxious to know more of the daily routine of life – the intimate glimpses that members of the family can best provide coupled with human interest stories that brighten the high moments when Sagamore Hill was the focus of national and world attention."[125]

The *Interpretive Prospectus* took this approach to new lengths: it was largely why its authors found the taped family interviews so exciting. The *Interpretive Prospectus* advised that room signs should be "personal in nature," in order to engage visitors. A sign in the Dining Room might "convey idea of room still ringing with babble of large family dining...," one in the Master Bedroom an "anecdote of children at Christmas." Not one of the suggested themes had any connection to politics or world events – not even that for the Library or the North Room, where so many important affairs of state had been transacted – and this despite the plan's emphasis on the "Summer White House" years.[126] The outdoor signs followed a similar pattern, though in place of anecdote they favored explanations of how things worked (the windmill) or were used (the stable or carriage house).

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[121] *Interpretive Prospectus*, pp. 20-21.

[122] *Interpretive Prospectus*, pp. 3, 8-9.

[123] *Sagamore Hill* (brochure), n.d.; Northeast Regional Office, Boston, Files of the Planning Program.

[124] Nelligan, Barnes, and Willcox, draft *Prospectus for "Old Orchard" Visitor Center*, p. 6.

[125] Letter, Wilshin to Alice Roosevelt Longworth, February 4, 1970; NPS Library, File: Correspondence, 1963-72.

[126] *Interpretive Prospectus*, pp. 13, 15, 16.

It is tempting to explain this interpretive approach as a continuation of the pattern set by the Theodore Roosevelt Association, and to a large extent it was. In particular, its most distinctive feature – the emphasis on domestic life – grew out of the TRA's interpretation of Sagamore Hill as a "national shrine" to the "highest traditions of American family life" – a resolve formed in 1949 in the context of anti-Communist fervor. Then, too, the TRA had been built on hero worship, and this had not appreciably diminished with time. The house's new interpreters were no more prepared to find fault with Theodore Roosevelt than the old ones. Yet as NPS Historian Barry Mackintosh has written, the agency felt "committed to positive portrayals" wherever it established sites to "'honor'" historical figures.[127] This would have been true with or without the association.

There were differences between the Park Service's approach and that of the association. Something about Theodore Roosevelt had deeply inspired many who knew him. They wrote luminously about him. Here is Hermann Hagedorn, in his 1953 guidebook:

> Theodore Roosevelt had something that we who are living here in America, a generation after his death, need.... It is not only his courage, his force in the cause of honesty, decency and fair play, or his power of decision, though certainly we desperately need all those qualities. It is something beyond. It is the fire in the heart that he had and that we need so much, the impassioned love for his country. Other leaders in our country have had such a fire in them, but he had it to a point where it changed people's lives, made them different, kindling fires in them that spread and lighted fires in yet others."[128]

Unlike Hagedorn, NPS interpreters had not been personally touched by their contact with Roosevelt; they could not share Hagedorn's deep faith in the transformative power of direct contact with a great man. For them, hero worship became something less personal, more conventional: less reliant on faith and more on anecdote.

There was another difference. For all Hagedorn's admiration of Roosevelt as friend and family man, he never lost sight of world affairs. His guidebook skillfully used political cartoons to keep Roosevelt centered within the context of world issues (Figs. 23, 24). And his description of the library, after the usual anecdotes about romping with children and dogs, abruptly changes tone:

> It was in the library, too, that, a month later, the President and the strong man of the Czar's government, the able, hard-boiled, cynical Serge Witte, took each other's measure. They did

[127] Barry Mackintosh, "Interpretation in the National Park Service," p. 36.

[128] Hagedorn, *Guide*, 1953, pp. 72-73.

> not like each other.... The President told him to forget it, and face the facts. Too bad the walls can't tell the details.[129] If the walls could not reveal the details, they could tell the broad outlines, and that of course was Hagedorn's point. But reading the site's *Interpretive Prospectus*, one might be unsure whether anyone was interested in hearing them. The irony was that Roosevelt's own children – as Mrs. Derby assured her interviewer in 1962 – were "always aware" of the great events in which their father was involved: "...we always knew what was going on....We knew it was of importance...." World affairs were part of family life: "We found out at meals, you see, or when we were off with him on excursions – off in the woods – or off playing games together – or off going down to the beach swimming...."[130] By 1970, it seemed that the two things – family affairs and world affairs – had come apart, and only the former continued to hold much interest to park staff.

Interpretation and the Landscape

For all that, Sagamore Hill's new interpreters did add a new dimension to the park's story. Apart from generalized references to family romps and the "strenuous life," the Theodore Roosevelt Association had pretty much ignored the landscape. The *Interpretive Prospectus* saw in it important possibilities. It proposed to "capture the feeling of life on a 'gentleman farm,'" using a variety of methods including interpreters dressed in period costumes, demonstrations, planting and even harvesting of crops with "period equipment" – and reconstruction of buildings such as the stable and windmill.[131]

This was all consistent with the *Master Plan*. But events outside Sagamore Hill, indeed outside the NPS, also shaped this aspect of the *Interpretive Prospectus*.[132] In 1965, a proposal to create a national system of operating historical farms created great excitement in Washington, D.C. Interior Secretary Udall endorsed it; so did the Secretaries of Agriculture and the Smithsonian Institution, and so did NPS Director Hartzog. Within the Park Service, Historian Roy Appleman (the same Appleman who had urged Conrad Wirth to decline the Birthplace) was assigned to lead the project, which moved forward energetically. As NPS Historian Barry Mackintosh relates, Hartzog nurtured strong feelings of rivalry with the Smithsonian. So the following summer, NPS staff considered how the agency might take the lead. Appleman and his colleagues prepared a list of 13 NPS areas where living farms could be developed:

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[129] Hagedorn, *Guide*, 1953, p. 53.

[130] "Interview with Mrs. Ethel Roosevelt Derby at Sagamore Hill," [1962], p. 2; NMSC, SAHI.015c.2 401550.

[131] *Interpretive Prospectus*, p. 5.

[132] The following account relies on Mackintosh, "Interpretation in the National Park Service," pp. 54-72.

Sagamore Hill was on the list. The Washington office asked all regions to experiment with costumed interpreters during the summer of 1967, and by October, Hartzog was urging a "living interpretation" program at every historic area that could support the "making of products for sale through the history associations." He was pushing the interpretation division hard for results, especially with living farms. By 1968, 41 areas reported engaging in some form of "living interpretation," and in 1970 the agency began publishing a brochure listing them. That was the year Sagamore Hill's *Interpretive Prospectus* was approved. Considering the depth of Washington's absorption with living history at this moment, the *Interpretive Prospectus's* emphasis on costumes and farming demonstrations seems quite moderate.

If indeed the *Interpretive Prospectus*'s authors were not genuinely or deeply interested in the potential of living history to interpret Sagamore Hill, it might help to explain an inconsistency within the *Interpretive Prospectus*. The master planning process had left the important question of a visitor center unresolved, and by the time the *Interpretive Prospectus* was written, the limitations of Old Orchard were impossible to ignore. The problem was the half-mile distance from the Theodore Roosevelt House, which kept visitation to just over half of total park visitors[133] (a figure that later studies continued to confirm over the next 25 years or so). The *Interpretive Prospectus's* authors now called once again for a new visitor center. Their "reception center," indeed, would have been larger than anything imagined by the master planners. In addition to every function assigned to it by the master planners, it was also to incorporate exhibits, a souvenir shop, administrative offices, and a 100-seat theater (Fig. 26).

Given the authors' emphasis on interpreting the estate as a farm – the costumed interpreters to "explain animal care and handling, use of tools, talk of farm life, and so forth" – one might expect their proposed visitor center proposal to be, at a minimum, consistent with the goal of restoring the landscape. But in fact, they proposed to put their imposing new structure in the very center of the historic landscape, between the existing parking lot and the Theodore Roosevelt House.[134] In this location it would effectively block any possibility of restoring the landscape for the foreseeable future. At least one official thought this unwise. The previous year, Chief Historian Robert M. Utley had read a draft of the *Interpretive Prospectus*. He commented tartly that it was a mistake to identify a location for the visitor center until after the Basic Data Study had been completed; otherwise, there was "danger of destroying the integrity of the site and

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[133] *Interpretive Prospectus*, p. 4.

[134] *Interpretive Prospectus,* esp. pp. 6, 7, 17; SAHI - CRBIB 010473. See also a drawing in the DSC's Technical Information Center: "Sagamore Hill, Visitor Center Schematic," October 30, 1969.

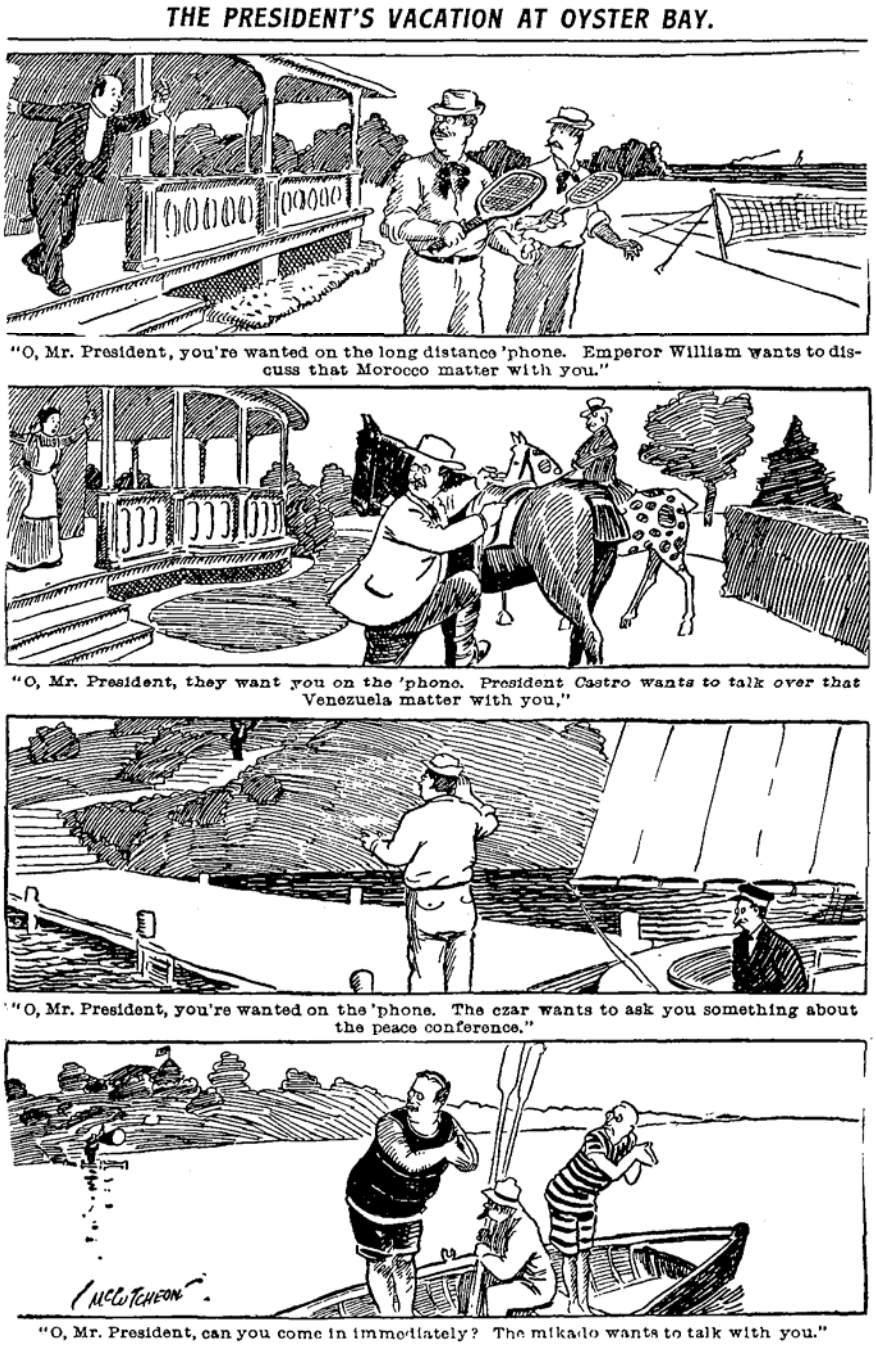

Fig. 24. Hagedorn's 1953 guidebook used political cartoons to suggest the blending of world affairs, politics, and personal life at Sagamore Hill (from Hagedorn, *Guide to Sagamore Hill*, 1953).

Fig. 25. The president at his desk in the library at Sagamore Hill, summer 1905 (from *Historic Furnishings Report,* Vol. 1, October 1989).

its values." He also urged "moderation" in the use of costumed farm interpreters: if the scene were properly restored, it would "speak for itself."[135] His memorandum went to Alan Kent, Acting Chief of the Division of Planning and Interpretive Service, and Kent took a different view of things. "Frankly, we're impressed," he wrote to Regional Director Lemuel Garrison: the *Interpretive Prospectus* was a "nicely written document." He met Utley's concerns with jovial condescension. The "boys in the Division of History," he told Garrison, sometimes "send us a skyrocket." Though they were right to worry about the visitor center "encroaching on the 'gentleman's farm' atmosphere of the place," the concession building "already dents this feeling and anything, nicely designed, beyond it would not interfere."[136]

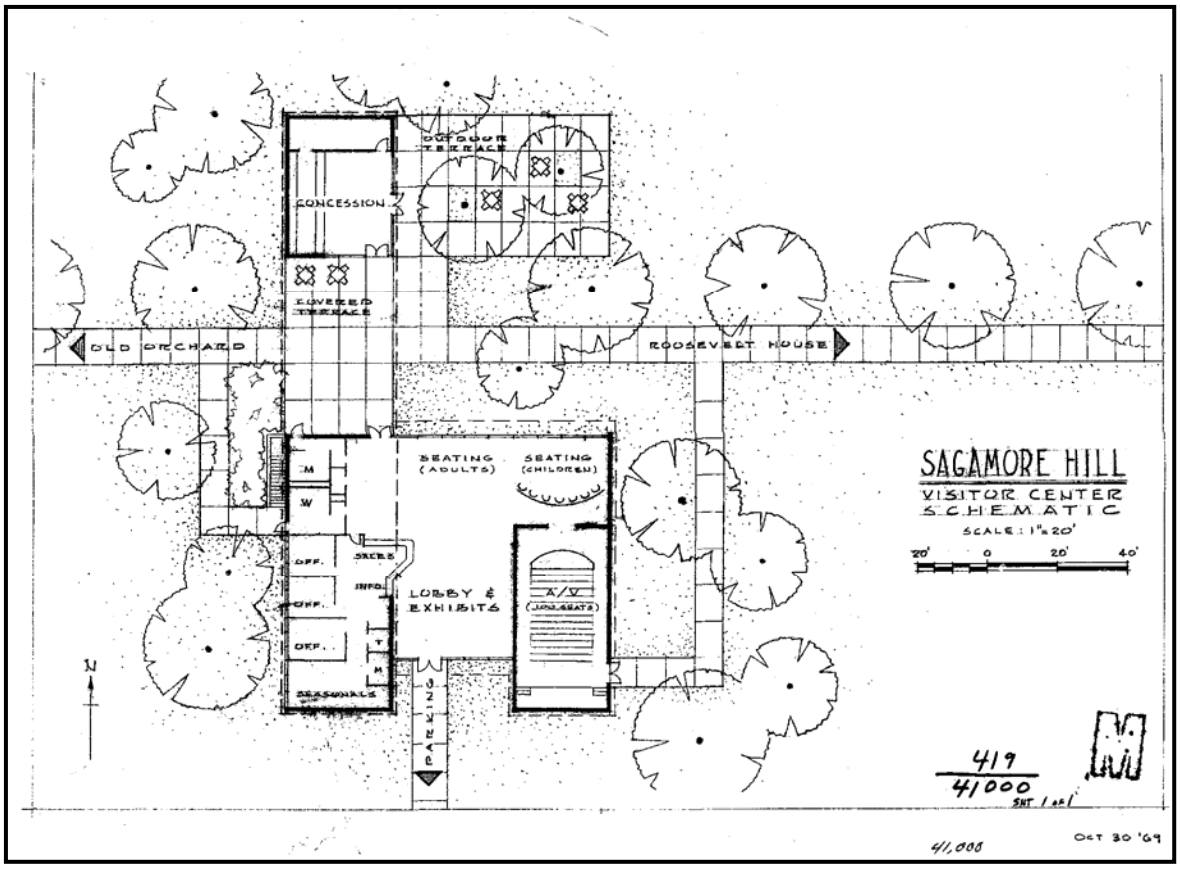

Fig. 26. Plan for a new visitor center, prepared in 1969 for the *Interpretive Prospectus*. (Courtesy Denver Service Center.)

[135] Memorandum, Utley to Chief, Division of Planning and Interpretive Services, April 29, 1969; NPS Library.

[136] Memorandum, Acting Chief, Division of Planning and Interpretive Services, Alan E. Kent, to Regional Director, April 30, 1969; NPS Library.

In the spring of 1969, Kent was reviewing the document in his capacity as acting division chief; in 1971, when it was published, his name was listed among its authors as Senior Interpretive Planner.[137] Uterly's concerns had no appreciable effect on it. The author's interests apparently lay more in interpreting the generalities of old-time farm life than the specifics of Theodore Roosevelt's estate.

This was less true in another area of landscape interpretation: environmental education. Momentum had been growing within the agency's interpretation division for an "educational campaign to further the general cause of conservation."[138] The impetus came in part from the wife of the Secretary of the Interior: Regional Director Jerry Wagers explained that in 1966 Mrs. Udall had become interested in trail projects, and had sponsored a program at the Service's Stephen Mather Training Center. By 1968, the agency was working with education experts to design a program of environmental awareness for use with schools. Parks were encouraged to designate Environmental Study Areas to be used by students in connection with the new educational materials, and that year Sagamore Hill established a 32-acre area, complete with a new mile-long nature trail leading from Old Orchard down to the beach. The park lost no time launching children's programs around the new trail, and set aside a room on the second floor of Old Orchard for environmental study. All of this was similar to programs launched at other parks (Fire Island, for example), but there were differences, too. Unlike Fire Island, for example, there would be no overnight camping. Instead, Sagamore Hill's natural area would offer the historical attraction of learning about Theodore Roosevelt and seeing what he had seen.[139]

The *Interpretive Prospectus* went much further. It proposed turning over all of Old Orchard for a Roosevelt Conservation Center.[140] This was an expansive plan, which depended entirely upon construction of a new visitor reception center to receive Old Orchard's exhibits.

The *Interpretive Prospectus* did not develop the Conservation Center idea in detail.[141] But it did suggest some areas in which environmental education could be given more scope. The film to be shown at the visitor center, for example, might emphasize Roosevelt's "devoted action in solving environmental problems" as an apposite lesson for the times. Another audiovisual presentation designed specifically for school groups

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[137]Here he was identified as Senior Interpretive Planner with the Eastern Service Center at Harpers Ferry.

[138] William Everhart (Assistant Director for Interpretation), quoted in Mackintosh, "Interpretation in the National Park Service," p. 67.

[139] Theodore Roosevelt Advisory Committee Minutes, April 9, 1968.

[140] *Interpretive Prospectus*, p. 4.

[141] The description of exhibits, audiovisual room, and meeting room on page 8 seems to refer to the facilities that exist and could be reprogrammed, rather than to those proposed.

could be "weighted somewhat" towards environmental education. And the *Interpretive Prospectus* called for significant research on the park's natural history to bolster its interpretation. Oddly, though, the 15 outdoor signs or audio stations it proposed completely missed the opportunity to discuss environmental issues. One sign, for example, explained the function and use of a chicken house, with particular attention to the "frequency of use of eggs and chicken for meals."[142]

Director Hartzog was enthusiastic about environmental education, and whatever might be the fate of the proposals made in the *Interpretive Prospectus,* Sagamore Hill planned to do more with it. In 1972, 1,200 students, mostly from Oyster Bay, were expected to participate in the program – a small percentage of the 37,500 children who participated in the park's regular programs, but still a number that suggested a significant commitment. The program operated on the "train the trainer" principle: that is, classes were taught by regular school teachers who had attended workshops at Old Orchard and learned about "the area and its relationship to the themes of Theodore Roosevelt's life."[143]

The chief of the NPS's History Division evidently had some concerns about the role of environmental education in the parks: it was "no substitute," he wrote, "for a strong 'standard' interpretive program." But his counterpart at the Office of Environmental Interpretation explained that environmental education, as conducted by the National Park Service, was not a "conflicting interest" but a "logical extension" of the regular interpretive program. It differed "only in that different audiences participate and different approaches are used in creating the learning experiences." It had the important advantage of providing "far greater outreach" than traditional programs and, as Vernon Gilbert put it, "parks cannot exist indefinitely as museum pieces."[144]

Sagamore Hill in 1973 was no museum piece, at least not in Gilbert's sense. Though some important initiatives had been blocked, the agency had accomplished a good deal. It had developed offices, staff housing, and new exhibits, installed audiovisual presentations, restored the third floor of the Theodore Roosevelt House, and launched a wide range of interpretive programs. It had also (as narrated in Chapter 4) carried out a substantial amount of preventive maintenance. Visitation had grown from under 43,000 in 1963 to more than 132,000 a decade later.[145]

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[142] *Interpretive Prospectus*, pp. 9-10, 16.

[143] "Briefing Statement for Theodore Roosevelt Birthplace and Sagamore Hill National Historic Sites" [typescript], May 14, 1973, p. 6; NPS Library.

[144] Briefing Statement," 1973, pp. 25, 28. The Chiefs were, respectively Russell Mortensen (Division of History) and Vernon C. Gilbert, Jr. (Environmental Interpretation).

[145] For visitation figures, see chap. 4 and the Appendix.

But now another development intruded. Having succeeded with environmental education at Sagamore Hill, the NPS organized a similar program at the Birthplace in New York. The idea was logical enough: Roosevelt was Roosevelt – a great conservationist and lover of nature – whether one encountered him in New York City or Oyster Bay. The TRA demurred: as described in Chapter 3, the episode triggered an upheaval; and when the dust had settled, the NPS found its relationship with the association on a new footing, with long-term consequences for Sagamore Hill.

CHAPTER 3

THE THEODORE ROOSEVELT ASSOCIATION AND THE ENDOWMENT

The relationship between the National Park Service and the Theodore Roosevelt Association has been long, close, and sometimes difficult. In the early years, the TRA wielded extraordinary influence over agency policy. On issues ranging from the acquisition of the Birthplace to the definition of Sagamore Hill's boundaries, the association's views were not only consulted but followed. Association involvement shaped the reorientation of the Theodore Roosevelt House's third-floor rooms, drove the reconstruction of the windmill and, much later, would dominate a two-day forum of historians convened to advise the park on new exhibits at Old Orchard. The relationship has often been cordial, but even when least strained, the challenges of managing it have absorbed a great deal of time and attention from a wide range of NPS officials. And it has not always been cordial. At moments of conflict, the TRA has been able to command the attention of officials stretching from mid-level park staff all the way up to the agency's director and, at times, to the Secretary of the Interior. Whatever its status at any particular moment, the challenges of maintaining the relationship seem never to be far from the consciousness of park leadership and regional officials.

There have been many reasons for conflict between the National Park Service and the Theodore Roosevelt Association, but prominent among them has been the endowment donated by the association in 1963, and in particular, the events of 1972-73 that redefined the relationship of the two parties to that endowment and thus to each other. As time passed, the new arrangements obscured the endowment's earlier history: the clear intent of Congress and of the participants in the transaction became hidden behind a veil of forgetfulness and misunderstanding, and in the gap created by the loss of institutional memory a series of misconceptions were allowed to flourish. Those misconceptions themselves eventually became causes of conflict. It is necessary now to pierce the veil of myth, retrace the events of 1972-73, and recover the intentions of those who donated, authorized, and accepted the endowment.

CREATION OF A LASTING RELATIONSHIP

A Relationship is Built

That the Theodore Roosevelt Association and the National Park Service would nurture a long-term relationship was not immediately obvious – certainly not from the enabling legislation. The TRA was to donate two houses and an endowment. It was to be consulted on the establishment of an advisory committee. That was all.[1] Yet during the negotiations over the transfer, Ronald Lee had flattered the association and welcomed its continuing involvement, even encouraging it to "help us, and to get after us if we need it."[2] During the Congressional debate, Congressman Rutherford of Texas praised the TRA's stewardship, and predicted that the advisory committee would assure its "continuing interest and support."[3] After the ceremonies, Director Conrad Wirth assured Oscar Straus that the agency wanted to "continue our close relationship with the Theodore Roosevelt Association."[4] And the NPS press release announced that the act provided for the TRA's executive committee to "serve in an advisory capacity to the Secretary of the Interior in matters pertaining to the preservation of the properties."[5] This was not strictly true: it was what NPS Regional Director Ronald Lee had wanted it to say, and it was what an early version of the enabling legislation had said, before Congress's Committee on Interior and Insular Affairs had narrowed the association's role to consulting on "the establishment of an advisory committee or committees. . . ."[6] In

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[1] Public Law 87-547, July 25, 1962, Sec. 2.(a) and 5. When Secretary Udall wrote to Oscar Straus on December 21, 1962, it was precisely in accord with the role specified by Congress for the TRA: "We certainly do want the recommendations of the Association with respect to the Advisory Committee...." (Letter, Udall to Straus, December 21, 1962; NPS Library).

[2] Letter, Lee to Bertha Rose, July 11, 1961; SAHI, TRA Papers, Folder 17).

[3] Congressional Record: House Debate on H.R. 8484, April 2, 1962. Rutherford's statement was made in reference to the amended bill, in which the TRA's consultative role was limited to the establishment of the advisory committee, rather than to the earlier version, discussed below, in which the TRA had a broader role.

[4] Letter, Wirth to Straus, July 10, 1963; NARA II - College Park, Office Files of Conrad Wirth, Box 22 Region V-VI, Folder: Region V 1963. In fact, Wirth had already written to Straus, on March 18, 1963, encouraging the TRA to continue its interest and provide "active support" and "background knowledge" (letter, NPS Library).

[5] U.S. Department of the Interior (DOI), NPS, News Release, July 27, 1962, "Interior Department Hails Signing of Bill Creating Historic Sites at Roosevelt Home and Sagamore Hill."

[6] This provision was under discussion among NPS staff during the spring of 1961. Ronald Lee proposed this language: "The Theodore Roosevelt Association *** serve in an advisory capacity to the Secretary of the Interior in matters relating to their preservation, through appropriate representatives mutually agreed upon." (Memorandum to Director, May 9, 1961: NARA-Philadelphia, Box 6, NPS Northeast Region Admin Corres 1953-68, Folder: Sagamore Hill 10/53-8/61). The provision regarding

any event, Lee believed the association's continuing involvement was "vital to the future of the project."[7] He cultivated the TRA assiduously, and ensured that other NPS staff would do so as well. And he helped to create an advisory committee that would directly represent the association's views, and its views alone.

Lee never wrote down why he thought the TRA's ongoing participation was so important. But in the 1960s the association still included a number of people, such as Bertha Rose and Ethel Roosevelt Derby, who had known Theodore Roosevelt or his widow. Lee – a leader in the historic preservation movement and a recognized expert in park interpretation – would have appreciated the value of the information they could provide. Immediately after the authorization, all three were hard at work reconstructing the historic look of the estate, and for some years thereafter useful information would emerge quite naturally from the long memories of association elders.

The TRA also brought along some quite likeable – and capable – people. "I have a high regard for Mrs. [Jessica] Kraft," wrote regional Museum Curator Horace Willcox, and so did everyone else he talked to, "from the postman to Mrs. Derby.... Personally I think her absence at Sagamore Hill would be a serious loss." Decades later, park Woodcrafter George Dziomba described Jessica Kraft as a "darling woman" – and "stern" in her commitment to the park.[8] Curator Amy Verone agrees with Dziomba that, although Kraft was not a trained curator, her work was essentially sound and valuable. Jessica Kraft was not the only TRA associate to impress Horace Willcox. He was also "much taken" by the "cheerful attitude and verve and unqualified sincerity" displayed by Mrs. Derby, Mrs. Rose, and Sagamore Hill Committee member Elisha Dyer.[9] "Congenial" was Master Plan participant Donald Humphrey's impression of Mrs. Rose and Mr. Dyer: their conversation was "instructive."[10] Another TRA asset now at the park was Chief of Maintenance Jack Maginnis, who was also highly regarded by Dziomba.

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appropriate representatives was penciled into a draft apparently attached to a letter from Wirth to Straus on April 13, 1961, but was not adopted. Drafts of the first version (without this provision), specifying endowment funds of $500,000 and $750,000, are attached to letters from Wirth to Straus, June 1 and 14, 1961 (NARA-Philadelphia, as above). The first version: *Congressional Record*, House Debate on H.R. 8484, April 2, 1962. The committee's amendments, Committee on Interior and Insular Affairs, Report to Accompany H.R. 8484, 87th Congress, 2nd Session, Report No. 1475.

[7] Memorandum, Lee to Assistant Regional Director, June 29, 1961; NARA-Philadelphia, Box 6, NPS Northeast Office Admin. Corres. 1953-68, Folder: Sagamore Hill 9/61-4/64.

[8] George Dziomba, recorded interview with author, December 7, 2004.

[9] Memorandum from Horace Willcox to Chief, Division of History & Archeology, March 9, 1964; NARA - Philadelphia, Entry 414B, Box 43, Folder: SAHI Exhibits. Also memorandum from Horace Willcox to Dr. Nelligan, Mr. Crouch, and Mr. Lee, August 1, 1962; NARA - Philadelphia, Entry 414B, Box 43, General Correspondence 1952-66.

[10] Memorandum, Naturalist (Master Planner) Donald Humphrey to Regional Director, August 15, 1963; NARA – Philadelphia, Entry 414B, Box 43, General Correspondence 1952-66, Folder: SAHI Exhibits.

For its part, the Theodore Roosevelt Association had made quite clear its desire to remain involved with the parks' management, and it would continue to do so. Its press release announcing the impending donation, for example, claimed that it would "act as program consultant on educational and other interpretive activities intended to keep alive the ideals and works of the former President."[11] In fact, the TRA had already taken steps to assure a substantial role. It had been the first to propose an advisory committee; it had then suggested appointing its own president to head the committee, recommended establishing a *single* committee for both sites, and finally nominated a slate drawn entirely from its own executive committee. The Department of the Interior, with the Park Service's blessing, approved the entire package. The process through which the Advisory Committee was created left no doubt that this was a *federal* creation, distinct from any committee or subcommittee of the association.[12] Yet the Advisory Committee had become a vehicle for projecting the association's influence over the sites in a way that may have been more forceful than what Congress had envisioned.

The TRA claimed other rights that would ensure lasting ties to the sites. Association President Nichols informed Ronald Lee that a "cardinal point in the relationship" was the association's right to continue using the Birthplace as its headquarters, rent-free ("If agreeable to you, we would think that the two rooms extending the full depth of the West House on the third floor, including the connecting hall, would be most appropriate...."); it also claimed use of a room at Old Orchard. And it insisted, initially, on an interlocking staff system in which the association would continue to have some use of former curators Miss Helen MacLachlan and Mrs. Jessica Kraft. This last, thought Nichols, would help to "promote the close and mutually helpful liaison which both parties wish to develop"; but it was the continued occupancy of space within the historic sites that would keep the parties closely entwined.[13]

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[11] Press release, "President Kennedy Expected to Ask Congress to Add Manhattan Birthplace and Long Island Country Home of 12th President to Nation's Shrines," February 16, 1962; NARA-Philadelphia, Box 6, NPS Northeast Office Administrative Correspondence 1953-68, Folder: Sagamore Hill 9/61-4/64.

[12] Appointments to the committee were made by the Secretary of the Interior, based on the recommendations of Regional Director Lee, who drew on a list of nominations submitted by Oscar Straus. Lee had advised Director Wirth that the legislation did not allow the authority to make committee appointments to be delegated to the subcommittee chairs, and he hoped the TRA would maintain its own "house committees...to work with the Advisory Committee," though sharing a single chairman. Lee again stressed the separateness of the committees in a memorandum to his assistant regional directors: "We have stressed the desirability of the Theodore Roosevelt Memorial Association continuing its own House Committees to work with the Secretary's Advisory committee...." (letter of nomination: letter of Secretary Udall to Oscar Straus, July 3, 1963, and Lee's advice: Memorandum of Regional Director Lee to Director Wirth, June 14, 1963; both NPS Library. Also Memorandum of Lee to Assistant Regional Directors, June 27, 1963; NARA- Philadelphia, Entry 414, Box 9, 1953-64.

[13] Letter, William B. Nichols to Ronald F. Lee, November 26, 1963; included in TRA Minutes.

Another factor was the TRA's penchant for appointing high-ranking Park Service retirees to its committees. Horace Albright, the NPS's influential second director, sat on the executive committee from 1950 through 1961. Conrad Wirth, after retiring as director in 1964, also joined the association's executive committee. Ronald Lee, who had done much as Regional Director to ensure that the TRA would retain an active voice in the site's future, retired at the end of 1965 and, within a few weeks, accepted an invitation to join the association's board. The following year he joined his former boss, Conrad Wirth, on the advisory committee.[14] Albright, Wirth, and Lee had served the National Park Service's interests with vigor. They would do the same for the TRA.

At first things went well. It was a honeymoon period, and both parties felt well-deserved satisfaction with each other and what they had brought about. So Lee went out of his way to inform the TRA about progress.[15] And the association wielded real power: they drove the Old Orchard initiative so forcefully that Superintendent Townsley was "afraid they will be most unhappy if the work is <u>not</u> accomplished...." To historian Frank Barnes, it was clear that the Theodore Roosevelt Association took an "over active interest" in the park. Yet such frustrations hardly tarnished a promising relationship: a year or so later, TRA trustee Elisha Dyer could report to his board on the "constructive use that the Park Service is making of the Advisory Committee."[16]

The Honeymoon Ends

Things changed rather suddenly in 1972. The Theodore Roosevelt Association found the new room barriers the NPS had designed for Sagamore Hill "aesthetically offensive."[17] They requested, and were denied, free office space at the house. These issues were annoying. But they would not, on their own, have been sufficient to turn the relationship into a new course. A more significant factor was the association's growing irritation with the way the National Park Foundation was managing the endowment.[18]

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[14] Letter accepting invitation from Bertha Rose, February 15, 1966, and letter to Conrad Wirth regarding appointment to Advisory Committee, November 9, 1967; Harpers Ferry Center, SAHI Box, Papers of Ronald Lee, Boxes 9 and 2. Lee died in 1972.

[15] For example, in the fall of 1963, he wrote to Elisha Dyer about proposals for a new burglar alarm system, provided a detailed report on the progress of the canteen and of various staffing issues, and promised to get in touch regarding question of staffing Old Orchard for public use (letter, Lee to Elisha Dyer, September 3, 1963: NARA - Philadelphia, Entry 414, Box 9).

[16] TRA Executive Committee Minutes, May 20, 1967.

[17] TRA Executive Committee Minutes, February 19, 1972. The barriers, of blond wood and Plexiglas, were not installed, according to the home's *Historic Structure Report* – Marie L. Carden, with Richard C. Crisson, *Sagamore Hill, Home of Theodore Roosevelt: Historic Structure Report* (Boston, MA: U.S. DOI, NPS, North Atlantic Region, Cultural Resources Center, Building Conservation Branch, 1988), p. 77.

[18] In 1968, the National Park Trust Fund was replaced by the National Park Foundation.

But it was two events unconnected with Sagamore Hill that decisively changed the relationship. The first was the Federal Advisory Committee Act, or Federal Advisory Committee Act (FACA). Adopted on October 6, 1972, the Act regularized the rules for advisory committees throughout the federal government and opened them to public and Congressional scrutiny. The law emphasized that "the function of advisory committees should be advisory only." It required the membership of committees to be "fairly balanced in terms of the points of view represented and the functions to be performed," and sought to protect committees from being "inappropriately influenced by any special interest." It ordered all meetings to be open to the public. And it prohibited any advisory committee from meeting until a charter consistent with the terms of the act had been filed with the government.[19] On October 6, the TRA's advisory committee – which met none of these requirements – ceased to exist as a legal entity.

Months earlier, the Theodore Roosevelt Association had foreseen this outcome and taken steps to ensure that the advisory committee, when reestablished under the new rules, would continue to reflect the association's views. Conrad Wirth crafted the TRA's strategy: the key point was to retain the right to nominate committee members. Wirth justified this by reference to the provision in the enabling legislation that called for the association to be "consulted by the Secretary of the Interior in the establishment of an advisory committee or committees."[20] Soon after the Federal Advisory Committee Act passed, the TRA presented its plan to Secretary of the Interior Rogers Morton.[21] It addressed certain criticisms that the NPS had of the advisory committee by this date: without term limits, its members were aging; few showed up for meetings, and it was hard to convene the committee when issues needed to be discussed. But it did not address one of the Act's central thrusts, which was to open committees up to balanced points of view and shield them from the dominance of powerful interests. In fact, it did the opposite; and so, as we shall see, did Secretary Morton. That the TRA intended to preserve its monopoly over the advisory committee became even clearer when it submitted its first round of nominations: nine names, all drawn from the association's board.[22] Meanwhile, if all of this failed to lead to a satisfactory resolution, Wirth was

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[19] Federal Advisory Committee Act, 5 USC Title 5, P.L. 92-463, October 6, 1972, Secs. 2 (b)(6), 5(b)(2-3), 9(c), 10(a)(1).

[20] Letter, Conrad Wirth to P. James Rockefeller, June 2, 1972; in TRA Executive Committee Minutes, August 5, 1972.

[21] Letter of John H.G. Pell, President of the TRA, to Rogers Morton, November 1, 1972; NARA II - College Park, MD: SI Central Classified Files 1968-72 [Parks & Sites Roosevelt], Folder: T. National Memorial Park.

[22] The nominations were approved by the board on December 2, 1972; TRA Executive Committee Minutes.

quite prepared to argue that the Association's advisory committee should be exempt from the provisions of Federal Advisory Committee Act.[23]

This situation would have been difficult enough to sort out even if both parties had been free to give it their full attention. But another issue arose while the TRA's proposals were under review, making everything more complex and emotional. The NPS had been active in environmental education for some years. In 1968, when the National Park Foundation was established, the TRA -donated endowment was transferred to it from the National Park Trust Fund. At that time, NPS Director George Hartzog had announced to all of the agency's regional directors that he expected the new foundation to be particularly helpful in the area of environmental education.[24] That year, the NPS launched an environmental education program at Sagamore Hill: it caused scarcely a ripple amongst the TRA (though the association did protest the decision to allow visitors to walk on the new trail without guides). But in 1972, when the departure of New York City Group staff from their third-floor offices at the Birthplace made space available, the Park Service used it to launch a new environmental education program there as well.[25] Then (without consulting the TRA) it garnered funds to extend it for a second year. Now the storm intensified quickly. Conrad Wirth was "greatly displeased." He recommended that the association prepare to bring suit against the government and demand the return of the properties – *both* properties – if the National Park Service did not preserve them as the TRA saw fit. Press reports had led other trustees to wonder whether this environmental education center was merely the tip of the iceberg: lurking just out of sight might be almost anything – a "center for senior citizens, youth study groups and possible waste recycling."[26] Relations quickly soured, with the TRA accusing NPS staff of failing to answer letters, and the NPS accusing TRA committee members of being unavailable for consultation.[27] "[T]he time has come," advised Conrad Wirth, "to present strong objections to the Park Service…"[28] And so, at 2 p.m. on May 16, 1973, a delegation consisting of P. James Roosevelt, Theodore Roosevelt III, Mrs. Derby, and

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[23] This position is noted in Robert M. Landau (Director, Office of Advisory Commissions), Statement of the Issue, in "Briefing Statement for Theodore Roosevelt Birthplace and Sagamore Hill National Historic Sites," May 14, 1973, Appendix, p. 22; NPS Library.

[24] Memorandum, NPS Director George Hartzog to the Directorate and all regional directors, October 3, 1968; Harpers Ferry, Papers of Ronald Lee [RG1], Box 8.

[25] For the rationale for emphasizing Roosevelt's environmental legacy at the Birthplace and at Sagamore Hill, see memorandum, Ted McCann (Assistant Chief, Division of Urban Programs) to Superintendent, NYC Group, May 28, 1971; Harpers Ferry Center: Ronald Lee Papers, RG1, Box 8, Folder: NYC Group 1-32.

[26] TRA Executive Committee Minutes, December 2, 1972.

[27] See for example TRA Executive Committee Minutes, January 13, 1973; and Landau, Statement of the Issue, "Briefing Statement," Appendix, p. 22.

[28] According to TRA Executive Committee Minutes, March 31, 1973.

Conrad Wirth went down to Washington – not to the National Park Service, however, but straight to the office of the Secretary of the Interior, Rogers Morton. Afterwards, P. James Roosevelt summarized the meeting to his board. "The Association," he had told Morton, "gave the building [i.e., the Theodore Roosevelt Birthplace] to the national government as a national historic site, and for the Park Service to declare that the site was going to be used as an Environmental Center or a theatre without the consulting of the Association was wrong."[29]

In the meantime, the TRA's opposition was causing considerable anguish at the National Park Service, not least because of Conrad Wirth's influence as the service's former director, but also because the Park Service had a great deal invested in the venture. The Theodore Roosevelt Environmental Education Center (TREE) had emerged from a collaboration with two important groups in New York – the Museums Collaborative, representing the city's major museums; and the Learning Cooperative, representing the Board of Education. Furthermore, the agency's environmental education initiatives were receiving strong support from a number of groups both inside the federal government and in New York, and only months earlier the NPS itself had showcased them before the Second World Conference on National Parks, a gathering of park managers from 80 nations at Grand Teton National Park. Many people would feel disappointed if the Park Service canceled the program. But more than this was at stake. A decade earlier, President Kennedy had emphasized the need for recreational land in the eastern states and in urban areas, and the NPS had been working hard to overcome the image of an agency preoccupied with maintaining vast wilderness preserves in the distant west. In 1972, when the Birthplace issue arose, the NPS was negotiating with the New York City administration over creation of a major urban initiative, the Gateway National Recreation Area. City officials, from the mayor's office down to the parks department, were openly skeptical about the Park Service's ability to run an urban park. NPS staff feared that canceling the Theodore Roosevelt Environmental Education Center would confirm their worst doubts, and jeopardize critically important land donations.[30]

In preparation for the TRA's May 16 meeting with Secretary Morton, the National Park Service compiled a 35-page briefing statement, which included a compelling case for the Theodore Roosevelt Environmental Education Center. The New York District, as well as the Office of Environmental Interpretation, Division of History, Division of Historic Architecture, and Office of Advisory Commissions – all

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[29] TRA Executive Committee minutes, May 26, 1973. The meeting had been proposed by Conrad Wirth at the meeting of March 31, 1973 (Executive Committee Minutes).

[30] "Briefing Statement," n.p., and Appendix, pp. 6-7.

based in the Washington office – supported it.[31] The Park Service pointed out that the program made use of empty office space upstairs in the Birthplace; no permanent changes had been made to the building (which was a reconstruction in any case); the limited number of students involved would put no stress on the facility; and the site was under-visited and underutilized. In fact, apart from guided tours, TREE was the only program offered there.

Though the National Park Service offered environmental education at many other locations, agency officials argued that the Birthplace was the "ideal place" for it. The Theodore Roosevelt Environmental Education Center was deeply rooted in the spirit of Roosevelt – his "love of birds, his desire to preserve parks and wildlife refuges, his Pure Food and Drug Act, and his abhorrence of the waste of natural resources," as well as his dedication to solving the great problems of the day, love of children, and belief in the value of education in the broadest sense. TREE was also "in the same spirit" as the TRA itself, which had once hosted lectures, films, and discussion groups for recent immigrants, as well as visits from Roosevelt Clubs in the public schools. President Nixon had supported the search for a "new understanding...of man's relationship to his environment"; the Park Service's own policies in this direction were well-established; and Interior Secretary Morton had bestowed praise on its environmental education programs.[32] Though the NPS did not point this out – perhaps because there was now a Republican administration in Washington – it might have added that the administration's campaign for the authorizing legislation had been based on Theodore Roosevelt's environmental legacy, and that both Congress and the TRA itself had supported this emphasis. The NPS also could have quoted from the TRA's teacher's manual and press releases of 1962, or from the impassioned speech delivered by Gifford Pinchot at the Association's founding, in which he had proclaimed the supreme importance of memorializing Roosevelt's conservation legacy as his central legacy. "There is no other topic that I can think of," Pinchot had said, "of such a permanent relation to the people of this country, of every country, as this Roosevelt conservation question."[33] The fact was, environmentalism was an important strand in the TRA's own heritage; so much so that, many years later, historian and association board member Douglas Brinkley could lecture the NPS that "Theodore Roosevelt's conservationist legacy should be [the]

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[31] Statements of support from each division were attached to the "Briefing Statement" (pp. 19-28). Those of the divisions of History and Historic Architecture were couched with caveats: as long as the program didn't substitute for a broader interpretation of Roosevelt (pp. 27, 28).

[32] Vernon C. Gilbert, Jr. (Chief, Office of Environmental Interpretation), in Statement of the Issue, "Briefing Statement," Appendix, pp. 24, 5, 11-12, 3, 13.

[33] Minutes of the Roosevelt Permanent Memorial National Committee, March 24, 1919; in RMA Executive Committee Minutes (1919-1926, p. 29).

dominant theme at the Old Orchard Museum."[34] But none of that mattered in 1973; the TRA's opposition was implacable.

Some agency officials diplomatically put the association's position down to a misunderstanding: its members hadn't seen the program in action, hadn't considered the ways it reflected Theodore Roosevelt's life and thinking, and didn't adequately understand the important role that environmental education was playing in the Park Service's attempt at "serving today's public." But Jerry Wagers, Director of the NPS's New York District, offered a blunter assessment: "The Committee wants to run area [*sic*] as Theodore Roosevelt Association formerly did. The objection of the Association is that they feel the Birthplace should be kept as a shrine, and not as a classroom." The issue was stark. Canceling the program, warned the NPS, would cause "irreparable damage to our total position in the New York City area."[35]

The Park Service faced a confusing situation. Though the TRA was a formidable opponent, the Federal Advisory Committee Act had put the legitimacy of its advisory committee in question; indeed, the committee no longer legally existed. So as part of its defense, the NPS presented Secretary Morton with a recommendation: the committee should be modified to include members outside the association. This was necessary to bring it into compliance with the new law; in addition, it would encourage committee members to see the value of "programs truly responsive to today's needs and opportunities." Failing that, the committee would have to be terminated, because the cost of maintaining the status quo would be that both Sagamore Hill and the Birthplace would be maintained "primarily as shrines, visited by few and increasingly irrelevant to the community around them." In any case, maintaining the status quo was probably illegal, since the committee did not meet the standards set by the Federal Advisory Committee Act.[36]

The NPS wrapped these challenging recommendations in soothing language: they assured the TRA that environmental education would "in no way take the place of the interpretation of Theodore Roosevelt as it is carried out presently," and existing members would be "invited to participate actively" on an expanded committee to make programs at the two sites "truly and increasingly responsive to today's needs and opportunities."[37] But internally, as Jerry Wagers's assessment revealed, the mood was combative. Robert M. Landau's assessment of the TRA was harsher even than Wagers's – and as director of the agency's Office of Advisory Commissions, his views presumably

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[34] Douglas Brinkley, "National Park Service – Organization of American Historians Report on Sagamore Hill," n.d. [ca. September 1998]; SAHI: Interpretation Files, Folder: Historians Conference.

[35] "Briefing Statement," p. 1; Jerry Wagers, Statement of the Issue, Appendix, p. 20.

[36] "Briefing Statement," n.p.

[37] "Briefing Statement," Appendix, p. 8.

carried some weight. The committee had "not been effective," nor did it meet the new requirement that committees be balanced in terms of points of view and functions. It "involves itself in management, and continually interposes its judgment in management decisions. There is an extremely strong proprietary feeling about the two sites." Landau particularly disliked the "aggressive posture assumed by the advisory committee and TRA" in recent months. In short, advised Landau, "If the Committee membership is not significantly modified to permit full expression of other points of view, the Committee should be terminated."[38]

All of this the National Park Service laid out for Interior Secretary Morton in the 35-page "Briefing Statement" dated May 14, 1973. Two days later the Theodore Roosevelt Association delegation arrived in his office. What happened next can best be told through P. James Roosevelt's account of the meeting, recorded in the association's minutes:

> Mr. Morton was accompanied by his aide, Mr. Nat Reed and a third gentleman who took notes. Mr. Conrad Wirth stated the case of the Association and spoke for about a minute and a half. Secretary Morton interrupted at this point to say that the Interior Department had met to discuss this situation and had analyzed it carefully. The Department he said knew why the Committee was there and was prepared to do whatever the family wished. A discussion followed and it was agreed in fact that the Environmental Center should be removed from 28 East 20th Street.[39]

The National Park Service's carefully planted and lovingly tended Theodore Roosevelt Environmental Education Center had been uprooted in less than two minutes. But there was more to come:

> The balance of the meeting was devoted to a discussion of the future of the Advisory Committee. The President has put out an order that where there are advisory committees that all committee meetings must be open to the public. The only way the Interior Department could see around this situation was to abolish the advisory committees and to consult with what they referred to as the family. Mr. Roosevelt interpolated that in the case of the TRA it is hoped that for "family" can be translated the "Theodore Roosevelt Association."[40]

The situation that Secretary Morton had "seen a way around" was, of course, the Federal Advisory Committee Act. The advisory committee would become narrower, not broader; less open to scrutiny, not more. The NPS's reaction to this severe setback does not appear to be recorded. Mr. P. James Roosevelt enjoyed the meeting: he found the

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[38] Landau, in "Briefing Statement," Appendix, pp. 22-23.

[39] TRA Executive Committee Minutes, May 26, 1973.

[40] TRA Executive Committee Minutes, May 26, 1973.

atmosphere "relaxed and friendly," and "declared that it was a thoroughly satisfactory meeting and the results were a total success."[41] Little wonder: the TRA had not only eliminated the offending program but also preserved the association's exclusive right to advise the Park Service both there and at Sagamore Hill – and this in the face of a federal law passed expressly to prevent just such a situation.

The Secretary's talk with the TRA next turned to the Birthplace's future, and the association conceded that the house presented a serious problem. Visitation was dismally low, costs unacceptably high. Perhaps the federal government could transfer it to another owner who would be willing to run it as a historic site? That did not happen. Quite the contrary, broad new streams of public money started flowing towards the Birthplace. Meanwhile, at Sagamore Hill, the TRA set about strengthening its influence. A few weeks after the meeting with Secretary Morton, Roosevelt told his executive committee that "the Association will assume Advisory Committee functions as long as it pleases the Park Service to consult with us."[42] Whether or not it pleased the NPS is hard to say, but as Sagamore Hill's annual report for 1973 noted, "We have been directed by the Secretary to meet with the family and keep them informed of our plans," and so they did.[43]

AN ENDOWMENT IS CREATED

Increasingly the subject of the Theodore Roosevelt Association's consultation would be the endowment.[44] This had been part of the package that the association

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[41] "Relaxed and friendly": letter, Roosevelt to Morton, May 17, 1973; Rogers Morton Papers, University of Kentucky Library. "Declared...": TRA Executive Committee Minutes, May 26, 1973. P. James Roosevelt also complimented Secretary Morton on the "good deal of homework" his staff had done, and invited him to visit the Birthplace (letter, May 17, 1973).

[42] Memorandum from P. James Roosevelt to TRA Executive Committee, July 2, 1973; included in TRA Executive Committee Minutes.

[43] Annual Report, 1973, p. 7; Harpers Ferry, SAHI, Box: Misc. Secretary Morton himself visited the Birthplace on May 31, where he met with staff and again with P. James Roosevelt. (Morton's trip itinerary and subsequent thank-you notes to Roosevelt, Superintendent Vernon Dame, and Curator Helen MacLachlan are in the Rogers Morton Papers at the University of Kentucky.) Subsequently, Roosevelt told the TRA board that Morton's "mind seems to have been turned 180E," but it is not clear what he meant (memorandum, P.J. Roosevelt to Executive Committee, June 5, 1973, in TRA Executive Committee Minutes). The park's *Historic Resources Management Plan* states "The Advisory Committee was abolished by the Secretary of the Interior in 1973. Currently, NPS representatives meet regularly with members of the TRA Executive Committee and both groups are kept apprised of each others [*sic*] plans, goals and objectives" – J. Brown, J. DeMarce, and P. Steele, *Historic Resources Management Plan, Sagamore Hill* (U.S. DOI, NPS, December 1975), p. 14.

[44] In 2000, the NPS's cooperative agreement with the TRA, written in 1984 and slightly revised in 1995, was the subject of renewed negotiations, during the course of which the Regional Solicitor of the NPS Northeast Region expressed certain legal opinions about the handling of the endowment. These issues will be discussed in a later chapter. Here the author wishes to note that the conclusions set forth

offered to the Park Service in 1960. Sums of $800,000 or $850,000 were initially discussed, but in the end the association, having sold part of the Sagamore Hill estate for $40,000, agreed to purchase Old Orchard for $115,000 and donate $500,000. Congress conditioned establishment of the historic sites on receipt of this endowment, and directed that it be "utilized only for the purposes of the historic sites established pursuant to this Act."[45] The great question that now arose was, who had the right to decide how to spend the money? It was an important question, for it involved not only control over endowment income – always a small sum relative to the park's overall budget – but also leverage over the park's preservation, development, and interpretation agendas.[46]

It is not immediately obvious why control over the endowment should ever have been in doubt. None of the parties involved in the transfer – Congress, the National Park Service, the Department of the Interior, the National Park Trust Fund, or the Theodore Roosevelt Association – ever made any public statement that could imply that the association would review, much less control, endowment spending. They made a good many statements to the contrary. It is important to review the evidence carefully.[47]

Though the legislation considered the TRA's future and laid out a role for it, it said nothing about any connection with the endowment beyond the fact of donating it. The Senate report similarly notes only that the association would contribute the endowment. The Department of the Interior's press release announces that the TRA had donated the endowment and would serve as an advisor, but only "in matters pertaining to the preservation of the properties." In a press release of 1962, the association noted its donation of the endowment, but did not mention it otherwise (though it does claim that the TRA will "act as program consultant on educational and other interpretive activities intended to keep alive the ideals and works of the former President"). Conrad Wirth's letter acknowledging receipt of the check makes no mention of any future connection between the association and the funds; the same is true of the documents transmitting the money to the National Park Trust Fund and the

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in this chapter, concerning the endowment's earlier history, are based on an independent review of all available documents dating from before 1996. The later documents did not become available to this researcher until after this analysis was completed and the chapter substantially drafted, nor did the author speak with the Regional Solicitor or anyone else connected with the 2000 negotiations until after this time.

[45] Public Law 87-547, July 25, 1962, Sec. 2.(a).

[46] A compilation of references to the endowment is presented in the Appendix. The question of the TRA's role in managing the endowment was formally addressed by the NPS Solicitor in 2000: the story is told in Chapter 5. However, the following account is based on an independent compilation and review of the evidence. The conclusions expressed by the author are his own and were reached independent of, and prior to consulting, the Solicitor's opinion.

[47] See the Appendix for a compilation of all recorded statements on the endowment from the early years.

Department of the Treasury. Many documents of the 1961-63 period note the intended purpose of the endowment (generally for the "upkeep," or in one instance to "assist in the maintenance and restoration of these properties"). They state that it is available for donation, or that it is to be (or has been) given, donated, received, offered, tendered, accepted, transferred, or acquired by donation. Nowhere in any of these documents is it stated or implied that the donor would retain authority over the funds. In fact, no speech, letter, memorandum, Congressional document, or press release connected with the offer of the endowment, the legislation, the transfer of the funds to the federal government, or their subsequent transfer to the National Park Foundation, mentions any TRA connection to the endowment beyond the act of giving it to the federal government.

Oscar Straus shared this view of the donation. In November 1960, Straus told his board that his "informal talks" with Conrad Wirth had concerned the Park Service's "taking all of the Association properties with the exception of a small endowment held back by the Theodore Roosevelt Association in order to make certain that the Association could be kept together in some working form":[48] that is all he had to say on the subject. In the December letter in which he proposed "turning over" the two sites, Straus wrote: "It is our present thought that this gift would be accompanied by a substantial portion of the Association's endowment fund, which now approximates $950,000." He then invited Wirth to discuss the matter with him if the government was interested in "this proposed gift." Straus did set one condition on the gift: he requested an assurance that the TRA's Sagamore Hill Committee "could become an advisory committee regarding the future operation of Sagamore Hill." But he mentioned neither money in connection with the advisory committee, nor association control in connection with the endowment gift.[49]

If neither Straus nor the government ever thought that the TRA would continue to exercise oversight over the endowment, some association trustees briefly considered, and rejected, such a role. When Straus convened the TRA's executive committee early in 1961, he spoke in terms consistent with his original offer: the issue, he said, was whether the NPS and the association should seek legislation "to transfer Sagamore Hill and Roosevelt House, together with a proportion of the Association's funds, to the Federal Government...." Horace Albright, explaining how the NPS operated, assured the trustees: "There is a trust fund, into which money can be put and earmarked so that it does not go into the Federal Treasury, but can be earmarked for special objectives, and there are many instances where this has been done." He also told the group he was

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[48] TRA Executive Committee Minutes, November 30, 1960.

[49] Letter, Oscar S. Straus to NPS Director Conrad Wirth, December 6, 1960; NPS Library, File: Correspondence 1941-62.

confident the Park Service would eagerly seek its advice. But, he said, "there is no way that control could be divided, it must pass directly to the Park Service." The question of earmarking the funds came up again later, when Mrs. Bullock asked "if funds could not be specifically allocated for the educational program." Both Straus and fellow-trustee Albright assured her that donated funds could be "earmarked" for certain purposes. But now Mr. Hall posed the further question of whether "funds could be earmarked for purposes within the fund." Straus's reply is significant: he "pointed out that some of the funds could be withheld." In other words, if the TRA wanted to control how certain funds would be spent, it could retain those funds. The last word on the subject was offered by Julian Street, who thought it would be "perfectly feasible to deliver half of the funds for this specific purpose and retain the other half under the control of the Association for what might come up after that."[50] As in other instances, the question of managing the endowment played a very minor role in the committee's discussion. Much more important was the general question of whether the TRA and its committees would be able to continue advising the NPS on managing the sites. However, the question of how much would be given to the Park Service certainly needed to be settled, and Street's proposal was almost exactly the solution that was eventually adopted.

An early draft of the authorizing legislation, which Wirth sent to Straus some time in April 1961, reveals that at this stage it was thought possible that the TRA might retain some connection to the fund. But that connection was limited to the authority to "invest and reinvest" it, subject to the Secretary of the Interior's approval. The draft implies that the association might also be entrusted with responsibility to invest future contributions from other donors. But it says nothing about having any voice in how the money was to be spent.[51] In any case, these provisions quickly disappeared.

On May 26, Straus moved to implement Street's proposal. He wrote to Director Wirth about the bill for the donation of the two properties, "together with an Endowment Fund in the amount of $500,000." Rather than the donation, however, Wirth wanted to discuss the TRA's plans for the *rest* of its endowment, which now amounted to another $500,000 or so. It had always been understood that the association would retain a portion of its endowment; in talking with Wirth the previous fall, Straus had characterized this portion as a "small endowment...to make certain that the TRA could be kept together in some working form."[52] Now this balance was at issue, because the Park Service had hoped for a much larger donation than $500,000. As recently as

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[50] TRA Executive Committee Minutes, January 9, 1961.

[51] Draft of bill attached to letter, Wirth to Straus, April [illeg], 1961; NARA - Philadelphia, Box 6, NPS Northeast Office Admin Corres 1953-68, Folder: Sagamore Hill 10/53-8/61. See Appendix for full text.

[52] TRA Executive Committee Minutes, November 30, 1960.

March, NPS officials had expected it to total $850,000. Meanwhile, the value of the TRA's endowment was growing, not shrinking.

While the shifting arithmetic is a little hard to follow, it can be worked out through a combination of close reading and inference. At the end of 1960, Straus offered the Park Service a "substantial portion of the Theodore Roosevelt Association's endowment fund, which now approximates $950,000"; he assured the trustees that a "small" portion would be retained to assure the Association's continuation. What was "substantial"? What was "small"? Mrs. Derby thought the association's activities in "the giving of information on TR" represented a "strong reason for trying to keep a TR Association"; to which Mr. Root replied that "holding out a part of the endowment for such purposes would mean a fairly large amount....$100,000 would be useless for such a purpose."[53] If we surmise that Root had not picked this particular figure of $100,000 at random, then we may also surmise that it represented the amount under discussion for retention by the association. That would mean that the TRA had discussed a donation of $850,000 – precisely the figure quoted by NPS staff as late as the following March.

By May, with the proposed donation set at $500,000, and the "small" retained portion grown to "half," Straus was in the position of explaining why the TRA needed to hold on to $500,000. The association, he said, had to retain funds to pay pensions to former employees, and to meet "certain other small liabilities." But he offered an incentive. The Executive Committee had been "considering the continued performance of certain of the Association's functions" after the transfer of the two sites, such as "assistance to the National Park Service" in making them "inviting and educational," "making information and materials regarding Theodore Roosevelt available to the public," and other initiatives that "might help achieve the purposes and preserve and operate the sites." The TRA might also continue its public-school essay contest, annual Theodore Roosevelt Medal, and other Roosevelt-related activities.

> The Association understands, of course, that especially in view of the small income it will have after the transfer of the sites and half its remaining Fund, it can do no more than assist the National Park Service which will be responsible for the sites and their operation....The Association would, I am sure, use its income (and capital, if necessary or desirable) only for one or more of the foregoing purposes, and if and when the Association decides that it no longer needs part or all of the balance of its Endowment for such purposes as the foregoing, it would turn over to the Secretary of the Interior as an additional Endowment that portion of its remaining Endowment Fund which it then no longer needs...."[54]

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[53] TRA Executive Committee Minutes, November 30, 1960.

[54] Letter, Straus to Wirth, May 26, 1961; SAHI: Curatorial Files.

Without promising anything, the letter encouraged Wirth to think the TRA would continue to support the historic sites – not by managing the endowment fund, but by continuing to spend its own funds. Not only that, but some day it might well "turn over" those funds as an additional endowment.

Straus added a further thought:

> It is understood that the Association and the National Park Service will exchange annually financial reports with respect to the use and status of the portions of the Endowment Fund *under their respective controls"* [italics added].

This exchange of information would presumably help the two organizations coordinate their activities. Yet one could hardly ask for a clearer acknowledgment that control over the two funds – that belonging to the NPS and that belonging to the TRA – would be quite separate. This separation of control was indeed what made the exchange of information both useful and necessary.

In mid-June, as Wirth conceded to the TRA's desire to donate the Birthplace, the director made a final attempt to boost the donation closer to its original value. The wording of his letter to Straus is interesting: "We believe," he said, "that we should have $750,000 *in the beginning*, rather than the $500,000 previously considered" [italics added].[55] Did Wirth believe there had been an offer of a second transfer of funds? By July, in any case, Straus could report to the executive committee that a satisfactory bill was ready to present to Congress: the TRA would donate $500,000 and retain the balance of its endowment, which had now grown to $1,200,000. His memorandum was intended to ensure the committee's support for the measure. If he had thought that any of the trustees believed the TRA should maintain control over the endowment after its donation, he had every reason to mention this now. Yet he did not. He did point out that "...the proposed bill, and the retention of some $700,000 should enable the Association and its Executive Committee to give advice and assistance to the National Park Service in administering Sagamore Hill and Roosevelt House, and to continue and strengthen its educational programs, both at Oyster Bay and New York City."[56] In other words, holding onto well over half its endowment would allow the TRA to continue shaping the evolution of the sites and their educational programs. This, of course, was precisely the solution proposed by Julian Street, but sweeter now by $200,000.

Congress passed the enabling legislation about a year later, and it had little to say about the endowment fund. It authorized the National Park Trust Fund Board (an entity created by Congress to receive private donations to the park system) to accept $500,000

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[55] Letter, Wirth to Straus, June 14, 1961; appended to TRA Executive Committee Minutes, June 15, 1961.

[56] Oscar Straus, "Memorandum for the Trustees of the Theodore Roosevelt Association, July 26, 1961; SAHI, Folder H15: Legislative Histories.

from the TRA, as well as whatever additional amounts it might from time to time decide to donate. The funds would be used only for the purposes of the two historic sites. The Secretary of the Interior would consult the organization regarding the establishment of one or more advisory committees.[57]

The Act contained a further provision which the TRA's directors, as its legally constituted trustees, were bound to consider with particular care. It amended the association's act of incorporation by giving it the power to donate part or all of its endowment fund to a public agency.[58] This measure was inserted into the bill as an amendment, and Congressman Rutherford assured the Congress that the association had either "suggested or concurred in" it.[59] While the measure tightly defined the purposes for which the TRA might part with its principal – protection of a historic site associated with Roosevelt – it placed no further conditions on its ability to do so. The Act might, for example, have required the TRA to maintain continuing oversight over funds donated from its endowment, but it did not.

This was not the last chance for the Theodore Roosevelt Association to advance its interests with the Park Service. Immediately after the Senate passed the Act, and anticipating Kennedy's signature, Straus sought a meeting with NPS staff to work out all of the complex details of the transfer. The participants clearly regarded this as an important occasion, and Straus summarized it the next day in a formal memorandum that he forwarded to Ronald Lee. Eight topics were covered: scheduling, operating the cafeteria and gift shop, providing evidence of title, inviting the President to the dedication, and so forth. The endowment was never mentioned.[60]

The passage of the Act brought other opportunities to raise the issue of control. The properties and funds had still to be turned over before the historic sites could be established, and before this could happen, the TRA's executive committee would have to pass a resolution authorizing the transfer of its property. This it did in May 1963. The resolution noted that the Congressional act "contemplates the transfer by this Association to the National Park Trust Fund Board of $500,000 to be utilized for the purposes of the aforementioned historic sites." It then stated the committee's resolution to "deliver to the National Park Trust Fund Board $500,000 for utilization for the

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[57] Public Law 87-547, July 25, 1962, Secs. 2 (a) and 5.

[58] "(4) The donation of real and personal property, including part or all of its endowment fund, to a public agency or public agencies for the purpose of preserving in public ownership historically significant properties associated with the life of Theodore Roosevelt." Public Law 87-547, July 25, 1962, Sec. 6.

[59] *Congressional Record*, House Debate on H.R. 8484, April 2, 1962.

[60] Memorandum, Straus to Lee, August 29, 1962. On September 17, Lee wrote back to Straus, confirming that the memorandum was in his view accurate and complete; NARA – Philadelphia, Correspondence Files regarding Establishment of National Park Service Sites at Sagamore Hill and Theodore Roosevelt's Birthplace: digital copy, NRBPA-79-413-ROOSEVELT (A), pp. 18-19 and 15-16.

purposes of" the two historic sites.[61] It said nothing further about the endowment, nor did it prompt any discussion among the trustees. Early in July, Straus forwarded a check for $500,000 to Conrad Wirth. The director's letter of acknowledgment made no reference to any conditions on the money, nor did his acceptance of it on behalf of the National Park Trust Fund.[62]

There were still other opportunities to raise the issue. A few months later William B. Nichols, who had succeeded Oscar Straus as TRA president, wrote formally to Ronald Lee to "set forth our Association's understanding of certain cardinal points in the relationship between the National Park Service and our Association...." He listed five points, all concerning the association's right to use space at the Birthplace and Old Orchard, and the ability of certain former TRA staff members to continue their work with the association while employed by the Park Service. These points (which had largely not been raised at the earlier Bankers Club luncheon) were offered as a "working basis on which the two parties start out together," and as "a pattern of the spirit and intention of cooperation between the parties, to be carried on, to mutual benefit, for a long time to come." Once again the TRA, having sought an opportunity to present its interests, had remained silent about the endowment.[63]

With ample opportunities to advance its interests with the federal government, the TRA was also not without ways of addressing the public. Shortly after Kennedy signed the bill, the association issued a revised edition of its teacher's manual, *Theodore Roosevelt and Responsible Citizenship*, taking the opportunity in the preface to describe the association's gift to the federal government of the "two properties and half a million dollars for their maintenance." It noted that both sites would be administered by the National Park Service. Closely paraphrasing the Act's language, it announced that the TRA would be consulted in the establishment of advisory committees. It asserted that the association would continue its educational activities. It said nothing further about the half-million-dollar gift.[64]

By 1962, one might have thought that any question of the Association's future role *vis a vis* the endowment would have been settled. Yet one question concerning the

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[61] TRA Executive Committee, May 7, 1961.

[62] Letters, Wirth to Straus, July 17, 1963; Wirth to Udall, July 26, 1963; Wirth to Treasury Secretary Douglas Dillon, n.d. [August, 1963]; all NPF Files. Three board members had to signify their acceptance on behalf of the National Park Trust Fund. Wirth signified his in his letters to Udall and Dillon, in which he asks for their acceptance as well. He mentions no conditions on the funds in these letters.

[63] Letter, President William B. Nichols to Ronald F. Lee, November 28, 1963; included in TRA Executive Committee Minutes, 1961-75.

[64] *Theodore Roosevelt and Responsible Citizenship: A Teacher's Manual of Suggested Class Activities* (New York: TRA, revised edition, 1962), p. 7. The first edition had been published in 1957. The preface was written after July 27, 1962, since it refers to Kennedy signing the Act.

endowment continued to raise persistent echoes within government: the possibility of future donations from the TRA.

THE POSSIBILITY OF ADDITIONAL ASSOCIATION GIFTS

Two months after Straus wrote his letter hinting at future gifts, Secretary of the Interior Udall wrote to President Kennedy urging support for the authorizing legislation. After noting the promised endowment, he assured the president that "It is very probable that additional funds will be added to this endowment by the Association in the future."[65] The idea was allowed to flourish. The following year an Assistant Secretary of the Interior repeated the claim, in the same words, to the director of the Bureau of the Budget.[66] In the interim, a type of financial optimism began to pervade official statements. "The $500,000 to be contributed by the Theodore Roosevelt Association," predicted the Senate report on the bill, "plus such additional sums as are received from the same source or from others, will either more than cover the development costs or, if treated as an endowment fund, will pay for a part of the maintenance costs." The remaining costs, "or a large part of them," could be covered by entrance fees or "modest" appropriations. "In any event, there will be comparatively slight annual cost to the Government."[67] Congressman Rutherford predicted that endowment income plus entrance fees would "go a long way toward meeting these costs."[68] Things got better and better. By July 1962, Senator Javits could assure the Senate "that fees and the endowment will make both properties virtually self-supporting and [quoting the Senate report] that 'there will be comparatively slight annual cost to the Government.'"[69]

Ten years later the endowment was providing no more than five per cent of the Roosevelt sites' operating budget,[70] and it is hard to understand how legislators and budget analysts could have convinced themselves that a trust-fund income of perhaps

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[65] Letter, Udall to President Kennedy, recommending enactment of bill, July 31, 1961. Udall wrote an identical letter to the Speaker of the House, and made the same claim in a letter of support for the bill written to accompany the Senate report (letter, Udall conveying recommendations of the Department of the Interior in favor of H.R. 8484, August 1, 1961, included in report to accompany H.R. 8484, 87th Congress, 2d. Session, Senate Report No. 1729, Calendar No. 1688, p. 3.

[66] Letter, Acting Interior Secretary Carver to David E. Bell (Director, Bureau of the Budget), regarding H.R. 8484, July 23, 1962.

[67] Report to accompany H.R. 8484, 87th Congress, 2d. Session, Senate Report No. 1729, Calendar No. 1688, pp. 1-3.

[68] Congressman Rutherford, supporting H.R. 8484, Proceedings of the House of Representatives, 87th Congress, 2nd Session. *Congressional Record*, Volume 108, part 4, p. 5525, April 2, 1962.

[69] Speech by Senator Javits in support of H.R. 8484, *Congressional Record*, Senate Debate, July 18, 1962, p. 13939.

[70] Robert M. Landau in "Briefing Statement," p. 22.

$20,000 to $25,000 per annum could make the sites "virtually self-supporting." As early as 1961, the Park Service's "Area Investigation Report" had predicted that operating expenses would rise to almost $110,000 by year five.[71] Perhaps the claims had been encouraged by the hope that the $500,000 endowment would soon be supplemented by annual contributions, or even by a second major donation. After all, Straus had hinted strongly to Director Wirth that additional gifts would be forthcoming. And so the Act had been written to allow the government to accept "additional amounts" from the Association; Congressman Rutherford told the Congress that the TRA had "offered to donate a fund of more than $500,000 to the Government...."; and the report of the Senate's Interior Committee said the bill's purpose was to provide for the acceptance (*inter alia*) of "a fund of $500,000 or more."[72]

Any such hope would soon be disappointed. By the autumn of 1963, the TRA had handed Ronald Lee the tax bill for Old Orchard, and declined to help purchase the Emlen Roosevelt property; Lee had been forced to advise Director Wirth not to ask the association for any more funds. It would have been ungracious to accuse the TRA of parsimony. But in hindsight these decisions appear to have been early warnings that, whatever the participants in the early negotiations might have intended or believed, further funds would not be forthcoming.

As the TRA's willingness to support Sagamore Hill ended, its own finances were poised for dramatic expansion – and with them its program of charitable giving. The donation had left the association in a strong financial position. Moreover, the arrangement with the NPS now allowed it to live rent-free at the Birthplace. Deep deficits now turned into surpluses so bountiful that the association had to find ways to spend more money in order to maintain its tax-exempt status. By 1972, as the Theodore Roosevelt Environmental Education Center and Federal Advisory Committee Act problems were brewing, the trustees were looking to add $20,000 or so per year to the benefactions they were already making. During the 20 years or so after 1963, the association donated museum specimens to the Theodore Roosevelt National Memorial Park,[73] and authorized substantial payments for scholarships and research grants. It funded a trip to Medora (ND), and made contributions to Bulloch Hall in Roswell (GA), to the Theodore Roosevelt Inaugural Site (also known as the Wilcox Mansion) in

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[71] In the "Area Investigation Report"; the budget figure includes personal services and direct expenses (p. 39).

[72] Provision in the Act: Public Law 87-547, Sec. 2(a). Congressman Rutherford: *Congressional Record*, House Debate on H.R. 8484, April 2, 1962. Senate Committee report: Report of Committee on Interior and Insular Affairs, To Accompany H.R. 8484, July 13, 1962. Senate, 87th Congress, 2nd Session, Report No. 1729.

[73] Memorandum, Acting Regional Director, NE Region, to Regional Director, Midwest Region, November 15, 1963; NARA – Philadelphia, Entry 414B, Box 43, Folder: SAHI Exhibits.

Buffalo, and to the Theodore Roosevelt Island project in Washington. It supported a Roosevelt genealogical project, publications about Roosevelt, Harvard's Theodore Roosevelt collections, and the American Museum of Natural History. Beneficiaries in Oyster Bay were the Theodore Roosevelt Bird Sanctuary, Theodore Roosevelt Memorial Park, and Young's Memorial Cemetery.[74] Capitalized, this additional spending represented the annual income from $300,000 to $400,000 in principal,[75] which might hypothetically have formed a second endowment gift. Yet in the TRA's discussions of its mounting surpluses, it is not recorded that any association trustee suggested contributing to Sagamore Hill. Much later, the association's tax filing for 2000 showed a total of $3,774 spent on Young's Memorial Cemetery, the Museum of Natural History, and the Roosevelt Study Center – all external projects – versus only $953 on Sagamore Hill. Meanwhile, with the purchase of Pine Knot – Roosevelt's Virginia cabin – the TRA had gotten back into the business of managing historic houses: in 2000, the new real estate venture cost the association $12,300.[76] Once again, funds went to a new cause, rather than to Sagamore Hill.

That is not to say that the TRA spent nothing on the site. It reprinted the guidebook; on the other hand, as John Gable told Superintendent Vidal Martinez, this was "an important source of income to the TRA."[77] In any event, while cultivating a close relationship to the Park Service, it managed to spend very little of its own money. In 1977-78, for example, the two organizations collaborated to mark the 25th anniversary of Sagamore Hill's opening. They presented three lectures, including one by well-known historian David McCullough. The NPS paid travel expenses and honoraria for two speakers, published a booklet, and arranged for a special exhibition of paintings. There were other sponsors. The Oyster Bay Bicentennial Commission and the Historical Society provided refreshments. The Friends of Raynham Hall helped pay the honoraria.

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[74] TRA Executive Committee Minutes, May 8, 1965, February 19, 1972, and May 26, 1973; "TRA Projected Budget for Fiscal Year 1979-1980; Corrected to conform with changes," "TRA Fiscal 1979-80," "Report on Budget – 1980-81," "Report on the TRA Budget, Fiscal 1981-1982," in TRA Minutes 1976-80 and 1981-84. TRA Executive Committee Minutes for October 27, 1973, provide another list of donations, which includes items such as $250,000 for an "additional contribution to Theodore Roosevelt Memorial Fund at American Museum of Natural History" in 1971, but it is not clear in every case whether the dollar figures represent money or in-kind contributions.

[75] Based on a 5% rate of return. TRA and NPS documents around 1960 quote a rate of 4% interest on principal; by 1972 it was certainly higher.

[76] TRA, "Return of Organization Exempt From Income Tax" (Internal Revenue Service Form 990) for year ending June 30, 2000 (information publicly available at www.guidestar.org, the website of GuideStar, the operating name of Philanthropic Research, Inc.) The exact figure for Pine Knot was $12,306.

[77] Letter, John Gable to Vidal Martinez, November 18, 1991; SAHI: Curatorial Files, File: Refurnishing Project.

The Oyster Bay Historical Society added a supplement for McCullough. The TRA's contribution to the anniversary consisted of refreshments for the exhibit opening.[78]

Much later, in 1995, a local group called the Friends of Sagamore Hill was organized to support the park. Two years later, the TRA absorbed it as a local chapter, with a mission including "advocacy, fund-raising, and other support efforts."[79] It enjoyed headquarters at Sagamore Hill and received regular briefings from Sagamore Hill staff. But although it organized and sponsored local events of various kinds, it did not provide significant financial support.

At the same time, the TRA was attempting to divert a portion of endowment spending back towards itself in the form of annual $5,000 payments to cover "administrative expenses."[80] Though it did not succeed in this, it did obtain (and attempted to secure in perpetuity) free use of the facilities at both parks for its annual meetings and dinners; for its executive committee, board, and site subcommittee meetings; for its annual TR Public Speaking Contest; and for "special programs and the like." It also got free storage space for its stock of sale publications, its archival collections, artifacts, and memorabilia; free office space at the Birthplace; and provision of photographs of objects in the site's collections at cost.[81] It also asked for free admission for its members and for the Friends of Sagamore Hill: it used this to promote its membership drives.[82]

THE ASSOCIATION GAINS CONTROL OVER ENDOWMENT SPENDING

If the hope that the Theodore Roosevelt Association might add to the endowment proved illusory, the possibility that the association would exert substantial influence over it soon became very real indeed. At the time of the transfer, Ronald Lee told NPS staff and the association that the TRA's continuing involvement was vitally important, and he went out of his way to encourage that involvement. Within a month of Sagamore Hill's official authorization, for example, he had instructed Superintendent Mullaly to arrange for those preparing the park's master plan to meet with Elisha Dyer and Mrs. Rose. Their conversation was substantive, detailed, and wide-ranging,

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[78] TRA Executive Committee Minutes, July 24, 1978.

[79] "By-Laws of the Friends of Sagamore Hill, A Chapter of the Theodore Roosevelt Association," nd, p. 2; SAHI: Archives of the Friends of Sagamore Hill, Box 1, Folder: By Laws.

[80] "General Agreement Between the National Park Service, the Theodore Roosevelt Association, and the National Park Foundation," undated draft [summer 2000]; SAHI: Curatorial Files.

[81] In Cooperative Agreements: see Chapter 5.

[82] E-mails, Mike Adlerstein to Regional Solicitor Tony Conte, July 20, 2000, and Superintendent Martinez to Conte and Adlerstein, July 21, 2000; SAHI: Curatorial Files.

touching on issues as diverse as the historical significance of Old Orchard, the possibility of restoring the windmill, and the operation of the concessions.[83] Dyer and Mrs. Rose were soon appointed to the TRA's advisory committee, and regional staff was conferring formally with the committee within a few months.[84] NPS staff took their views seriously. The tenacity with which the association drove the Old Orchard project was one example of how it wielded substantial influence in quite important decisions. By the early 1970s, this very active advisory role had begun to encourage the impression – which later turned into reality – that the TRA wielded authority over endowment spending. One reason was that the advisory committee's discussions had begun to include this subject, and it became harder and harder to distinguish the agency's generally deferential posture from acquiescence to association control.

Reporting to his fellow trustees in 1967 on the Park Service's "constructive use" of the Advisory Committee, Elisha Dyer noted that it had been formed to "advise the Park Service on appropriate ways to spend the interest on the $500,000 donation of securities that accompanied the gift...."[85] The record provides no support for this claim; no one else, from the NPS or the association, ever expressed Dyer's view of the Advisory Committee; yet something must have happened to encourage Dyer's belief. Or perhaps the Park Service's deference to the TRA had simply created a context in which the committee had come to believe it had authority over whatever it discussed. In 1966, in any event, the committee had begun to discuss the endowment.

Upon receiving the donation in 1963, the Park Service had placed it in the U.S. Treasury, with the notation that there was "no immediate need or plan to utilize any part of the donation in the near future."[86] Acting Director Hillory Tolson told Ronald Lee the funds were "tentatively earmarked" for the conversion of Old Orchard, but emphasized that this would need to be considered in light of the overall financial situation when the funds were actually requested. The first year's income would not be available until November or December of 1964, and could not be accurately predicted. "While we are tentatively willing to go along with your proposal to use the first year's income from this trust fund investment at Sagamore Hill," the letter concluded, "we feel

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[83] Memorandum, Naturalist/Master Planner Donald W. Humphrey to Lee, August 15, 1963; NARA-Philadelphia., Entry 414B Box 43, Folder: SAHI Exhibits.

[84] Memorandum, Regional Museum Curator Horace Willcox to Chief, Division of History & Archeology, March 9, 1964; NARA-Philadelphia, Entry 414B, Box 43, Folder: SAHI Exhibits.

[85] TRA Executive Committee Minutes, May 20, 1967.

[86] Memorandum, Hillory Tolson, Assistant Director, Administration, to Director, September 27, 1963; National Park Foundation (NPF) Files).

that the area's needs should be met from appropriated funds to the fullest extent possible."[87]

Lee attended the first meeting of the TRA Advisory Committee a few months later, and the association showed only moderate interest in the endowment. Straus asked about the income. Lee replied that he had "applied for it to help meet the needs, but that [as Tolson had directed] it will be reserved for purposes not normally met from appropriations."[88] In fact, the endowment does not seem to have been tapped until 1966: when it was, NPS staff brought up the issue along with all the other policy matters, large and small, that it was accustomed to discussing with the Advisory Committee. Lee was not among the agency's delegation this time, having retired the previous year. When the NPS staff sat down to discuss the endowment in 1967, they found Lee sitting across the table, for he had now joined the association's Advisory Committee.

The National Park Service took these meetings seriously: 1968's delegation totaled eight staff, including the General Superintendent of the entire region and the curators of both houses. (By contrast, only six of 11 committee members attended.) The NPS presentations were thorough, and so were the committee's reviews. In 1967, following a detailed briefing on projects authorized to date, the committee discussed in depth proposed expenditures for removing overhead power and telephone lines, restoring historic books, installing floodlights on the exterior of Sagamore Hill and Old Orchard, restoring floors and woodwork, and miscellaneous carpentry. The most probing questions came from former NPS officials Wirth and Lee, who believed there was "a hazard in spending trust funds for maintenance." The following year Wirth proposed that the Advisory Committee "establish criteria on what should be done with the trust fund and what should be done by the Federal Government."[89]

It is useful, in light of later disagreements, to distinguish clearly between what the committee was and was not doing. On the one hand, it offered suggestions, to which the Park Service was consistently deferential. For example, when Conrad Wirth proposed an alternate form of floor covering for a hallway, the NPS agreed to look into it; and when the staff returned the following year, they were able to report both that his suggestions regarding the power-line issue had saved $3,500, and that Lee's concern about the maintenance item had been "solved." But the committee never offered to formally approve the agency's proposals, nor did the agency ever request such approval. Discussions ended without resolutions or votes: they were simply discussions.

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[87] Memorandum, Acting Director Hillory A. Tolson to Lee, November 19, 1963; NARA - Philadelphia, Entry 413, NPS Northeast Office General Correspondence.

[88] Theodore Roosevelt Advisory Committee Minutes, February 10, 1964; Ronald Lee Papers, Harpers Ferry Center.

[89] Theodore Roosevelt Advisory Committee Minutes, November 21, 1967, and April 9, 1968.

Resolutions *were* offered on matters closely related to endowment spending. In 1969, Wirth requested and received support for a Park Service suggestion to alter the process by which the National Park Foundation made endowment funds available. The committee also passed a resolution to support the proposed reconstruction of the windmill, a project for which endowment funds would be used. Yet it was not the funding, but rather the "windmill construction" itself, that the committee's resolution approved.[90]

Still, the distinction between consulting on policy matters and ruling on endowment spending was becoming harder to discern. The Park Service's deference was only one reason. By around 1970, the TRA was beginning to show a more active interest in how the endowment fund was being managed. Sagamore Hill was facing significant repair and maintenance expenses, NPS funding was limited, and the park was drawing on endowment funding to cover not only expenses such as the design of a reproduction windmill, but also the replacement of rotting window frames. As NPS veterans, committee members Lee and Wirth were experienced in the ways of federal spending, and they thought that a too-ready reliance on endowment funds would simply encourage the government to hold back. "As long as the Park Service used Theodore Roosevelt Trust Fund income for maintenance," Wirth advised the park's site manager, "the Service would not get appropriations."[91] There was another concern. Some $40,000 in endowment funds had been targeted for a film about conservation, while another $16,000 was requested from the endowment (or perhaps from the TRA itself – it is not clear which) for an exhibition on Theodore Roosevelt, sculptor Augustus Saint-Gaudens, and the arts. Wirth and Lee took the lead in questioning how these projects "related to the Theodore Roosevelt Trust Fund," and there was "considerable discussion" of the question. The two former NPS men wanted it clearly understood that they "would not authorize the spending of the Trust Fund beyond what it was given for." They clearly had the park's enabling legislation in mind: it strictly limited endowment spending to "the purposes of the historic sites" therein established.

At this time, the TRA's growing interest in endowment spending focused on two concerns: that using endowment funds for maintenance would encourage the government to shirk its budgetary responsibilities, and that spending on nonpark projects was diverting money away from the endowment's stated purpose. The latter concern involved the National Park Foundation very directly. At Chairman Wirth's request, Superintendent Wagers reported on the fund's status in 1970. He reported that Mr. Garvey of the foundation had told him the fund was "in their keeping, and they could do with it as they saw fit." Lee reacted sharply, pointing out that the enabling

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[90] Theodore Roosevelt Advisory Committee Minutes, April 15, 1969.

[91] Theodore Roosevelt Advisory Committee Minutes, November 18, 1970.

legislation (with which he had reason to be familiar) restricted the fund to the "historic preservation of the Theodore Roosevelt Birthplace and Sagamore Hill." Wirth agreed that this was "a serious situation." If the Advisory Committee was frustrated with the foundation, so was the National Park Service. Despite annual requests, Wagers complained, the foundation would not provide any accounting of the funds.

By 1972, the TRA's unhappiness with the National Park Foundation had deepened, as it learned that the endowment funds were earning a poor rate of return, and that the foundation had commingled them with other funds.[92] Little wonder, then, that Wirth was moved to remark that "the money question was the problem of the Association – not of the Advisory Committee only, as it is the Association's money."[93] Presumably he was suggesting that the association, as donor, had an interest in seeing that the fund was well looked after. Yet the comment revealed something else. Strictly speaking, the endowment was *not* the "TR Association's money": it was the government's money. But emotionally, the association had never let go of what it had given away almost a decade earlier. Nor had it really given up the houses, and Wirth's claim to the money was quite consistent with the "over active interest" of which Frank Barnes had warned Ronald Lee in 1966, and with the "extremely strong proprietary feeling about the two sites" that the director of the NPS Office of Advisory Commissions would soon criticize. This proprietary feeling now began to extend itself quite explicitly to endowment spending and, at least at first, the Park Service did not openly resist. In 1972, the service's written presentation of endowment spending was no longer entitled "Proposed Projects," as in the past, but "Recommendations for Expenditures of Theodore Roosevelt Association Funds" – a subtle but significant change. And when the association came to ask the agency to report on projects presented or discussed at the previous year's meeting, these were referred to as "projects approved."[94]

The irony is that two former senior officials of the National Park Service – Conrad Wirth and Ronald Lee – helped greatly to encourage the growth of the association's "proprietary feeling" towards the endowment. Both conveyed the impression in meetings that they understood the NPS's business better than its current representatives, and could do a better job of protecting Sagamore Hill and its endowment. Their energetic advocacy validated and encouraged the protective instincts of other trustees. Perhaps more importantly, by shaping the context in which a new executive director, John Gable, would arrive in 1974, it colored the two institutions' evolving relationship over the next 30 years and more.

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[92] See TRA Executive Committee Minutes, February 19, 1972, and March 30, 1974.

[93] Theodore Roosevelt Advisory Committee Minutes, May 17, 1972.

[94] Theodore Roosevelt Advisory Committee Minutes, May 17, 1972.

The Advisory Committee's growing interest in the endowment was taking place within an increasingly charged context. By the spring of 1972, the NPS and the committee were becoming irritated with each other. Much of the discussion at that meeting was devoted to the problem of poor committee turnout at meetings (the tally at this particular meeting was seven Park Service staff and six committee members). Then, General Superintendent Jerry Wagers introduced his first substantive presentation of the environmental education center plans for the Birthplace – to a sour and even hostile reception. Next, as the Theodore Roosevelt Environmental Education Center issue intensified during the following months, the Federal Advisory Committee Act was passed. When the dust had settled in 1973, the TRA had demonstrated its muscle. The Theodore Roosevelt Environmental Education Center was gone. So, it is true, was the Advisory Committee, but in its place rose a much-strengthened association.

The Theodore Roosevelt Association now began to focus its newly enlarged influence on taking the Park Service to task and firmly grasping control of the endowment. A few weeks after the fateful meeting with Secretary Morton, P. James Roosevelt informed his fellow trustees that the executive committee would be taking on the Advisory Committee's role, and that General Superintendent Jerry Wagers had "consented" to meet with them. Under the circumstances, Roosevelt was "naturally anxious to have as good a turnout" as possible.[95] Wagers attended; he and other staff presented their spending plans for the endowment; and afterwards the committee made, seconded, and carried a motion to "endorse" them.[96] Without any statutory requirement to do so, the Park Service had now come remarkably close to an appearance of submitting its spending plans to the TRA for approval. It was a fateful precedent. In 1975, the National Park Service began its presentation by "submitting" a list of "recommendations" for "approval." In due time, these were "approved" by unanimous vote and then "recommended to the Board of the National Park Foundation for approval."[97] While the association's reception of National Park Service funding proposals during these years was highly favorable, sometimes outright laudatory, nothing could hide the fact that the TRA now had the upper hand.

The Role of the National Park Foundation

The Theodore Roosevelt Association's mention of the National Park Foundation (NPF) brings up an interesting point, for the triangular route that joined the National Park Service and the TRA to the holder of the funds – the National Park Foundation –

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[95] Memorandum, P. James Roosevelt to TRA Executive Committee, July 2, 1073; included in TRA Executive Committee Minutes.

[96] TRA Executive Committee Minutes, August 25, 1973.

[97] TRA Executive Committee Minutes, July 9, 1975.

had never been completely charted. There were clues. In 1967, Congress had established the National Park Foundation to solicit and manage private gifts for the benefit of the National Park Service. The foundation took over the Trust Fund's role, as well as its assets. Congress gave it authority to "sell, lease, invest, reinvest, retain, or otherwise dispose of or deal with any property or income," except insofar as a particular instrument of transfer might dictate otherwise.[98] There were no contrary provisions with regard to Sagamore Hill, nor did the legislative history of the park's enabling act point to any future role for the fund's donor – the TRA – in relation to the endowment. Logically, then, there should have been no triangular route at all, but merely a line connecting the NPF to the Park Service, with statements of need flowing one way, and funds flowing the other way. Yet the foundation's poor performance had given the TRA cause for concern that its donation was being poorly managed. Now, the association set out to insert itself as the third point of a triangle, indeed as its apex.

Before 1972, there is no evidence that the Theodore Roosevelt Association ever took on the responsibility of authorizing the disbursement of funds. This began to change, along with the rest of the endowment spending process, in 1973. That year, Wagers told the committee that the NPF "would like to have the concurrence of the group who had contributed to the fund" – but it needn't be formal, merely an "indication of the Executive Committee."[99] In 1975, the TRA explicitly interposed itself as gatekeeper between the NPS and the funds. That year, the park's *Historic Resources Management Plan* described the process as one in which proposals are "reviewed jointly, enabling both organizations to present unified recommendations for the consideration of the National Park Foundation."[100] But in fact, under the new arrangement, the Park Service submitted its proposal to the TRA, and the association assumed the responsibility or prerogative, having approved it, of authorizing payment.

The TRA would soon codify this procedure. In 1977, its minutes declared that "all requests to the Foundation by N.P.S. for expenditures of income must be approved by the T.R. Association before submission to the National Park Foundation...."[101] And the following summer, after meetings involving all three organizations, NPS Regional Director Jack Stark put on paper a set of procedures that essentially ratified this understanding. First, the Park Service would sort out its own priorities. Then, a "consolidated list" of funding proposals would be "submitted to the Association." Next, "the Association will advise us by letter the [*sic*] projects and dollar amounts approved for the upcoming fiscal year." Finally, the association's letter, with approval of the

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[98] P.L. 90-209, December 18, 1967, Sec. 4.

[99] TRA Executive Committee Minutes, August 25, 1973.

[100] Brown, DeMarce, and Steele, *Historic Resources Management Plan*, p. 14.

[101] TRA Executive Committee Minutes, August 17, 1977.

National Park Foundation's board, would serve as "authorization for the Superintendents to begin work on the approved projects."[102]

What a long way the endowment – and the service's relationship with the Theodore Roosevelt Association – had come since Oscar Straus had offered to turn over half of the association's endowment, and Congress had sought its counsel on the appointment of an advisory committee. By the end of the 1970s, the relationship had been turned on its head. That this situation would cause discomfort and ultimately resentment goes almost without saying. Perhaps more to the point, it would seem to have been in conflict with the spirit, and perhaps the text, of two federal laws: the Act authorizing Sagamore Hill, and the Federal Advisory Committee Act. Congress had written the Federal Advisory Committee Act not only to ensure that diverse perspectives were represented on committees, and to open up the advisory process to public scrutiny and participation, but also to guarantee that "the function of advisory committees should be advisory only." Thus it had directed that:

> Unless otherwise specifically provided by statute or Presidential directive, advisory committees shall be utilized solely for advisory functions. Determinations of actions to be taken...with respect to matters upon which an advisory committee reports or makes recommendations shall be made solely by the President or an officer of the Federal Government."[103]

By the end of the 1970s, it would seem that the TRA's executive board was, in fact, making "determinations of action." One could argue that the association was merely advising the National Park Foundation, and that the foundation's trustees – not the association – were making the requisite determinations of action. But, by law, only two of the foundation's eight trustees were officers of the federal government.[104] In any case, there is no evidence that the National Park Foundation's board ever exercised independent judgment in reviewing and acting upon the TRA's funding requests. NPS staff members *were* federal officers, but in the matter of decisions on endowment spending, they had been shouldered aside. It was as if the National Park Service had become advisor to the TRA.

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[102] Letters of Jack E. Stark to John L. Bryant, Jr. (President, National Park Foundation), July 25 and August 7, 1978 (photocopies in SAHI Curatorial Files). The second letter contains amendments to the first, notably the insertion of the NPF board into the authorization step. The process as described contains several further steps, but these pertain only to the mechanics of issuing, depositing, and accounting for checks. The NPS took a slightly different though not fundamentally opposed view of the process: "Additionally, proposals for expenditure of endowment interest funds are reviewed jointly, enabling both organizations to present unified recommendations for the consideration of the National Park Foundation" (*Historic Resources Management Plan*, p. 14.)

[103] Federal Advisory Committee Act, 5 USC Title 5, P.L. 92-463, October 6, 1972, Secs. 2 (b)(6) and 9 (b).

[104] An Act to Establish the National Park Foundation, P.L. 90-209, December 18, 1967, Sec. 2.

And so things would remain for the next few years. In 1982, the National Park Service and the Theodore Roosevelt Association prepared a formal agreement to codify their post- Federal Advisory Committee Act consultative relationship. The association regarded its authority to approve endowment spending as a given: executive director John Gable claimed that the TRA's records were "quite clear on all aspects of the relationship between the National Park Service and the TRA" – this one included. If there had been "confusion," that was only because of the Park Service's frequent "changes in policy and personnel."[105] This claim was not entirely accurate: if the association's records showed anything clearly, it was that the TRA had never intended to exercise control over the endowment. In any case, Gable assured the trustees that in negotiating the new written agreement, he had set out to "maintain and support those rights which the Association has traditionally claimed, including the right to review the annual funds...."[106] In this he succeeded. In 1984 the NPS pledged in a written agreement to "submit to the Association for review and concurrence, the annual Service funding proposal" for the endowment.[107] So accustomed to the practice would both parties eventually become that, some years later, the park's annual report could state quite matter-of-factly – as if it required no further explanation – that the Theodore Roosevelt Association had "authorized the expenditure" of money from the "National Park Service Endowment Fund."[108]

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[105] TRA Executive Committee Minutes, May 8, 1982.

[106] John Gable, "Report to the Executive Committee," April 13, 1984; SAHI: Curatorial Files.

[107] "Cooperative Agreement between the National Park Service and the Theodore Roosevelt Association," signed December 26, 1984; SAHI: Curatorial Files.

[108] Annual Report, 1996; SAHI: Central Files, Folder: A 2621.

CHAPTER 4

RUNNING THE PARK

PREFACE: 1976

The year 1976 was a milestone in Sagamore Hill's history: the park gained its first superintendent since 1963. Less than five months after the park's inauguration as a National Park Service area in 1963, the agency had abolished the position of superintendent for the newly created park. Franklin Mullaly moved on, and Sagamore Hill was placed under the superintendent of the Statue of Liberty and Castle Clinton in New York. Six weeks later, the New York City Group was established, and Sagamore Hill became one of its seven sites. This arrangement lasted from the beginning of 1964 through the beginning of 1967. Then, the administration of Fire Island National Seashore was combined with that of the New York City Group under a single superintendent. This lasted until the end of 1971, when Fire Island was formally added to the New York City Group, which now became the New York District. That in turn lasted until the beginning of 1974, when the district was dissolved and reduced to the New York Group. Fire Island became an independent park unit, but Sagamore Hill remained part of the consortium. This arrangement continued until August 1976. In that Bicentennial year, the New York Group was reorganized. Parks and historic sites in Manhattan (including the Theodore Roosevelt Birthplace) became part of a new group, Manhattan Sites. Sagamore Hill once again became an independent unit of the National Park system.

This reorganization brought no major policy shift at the park, yet its impact was nonetheless marked. The years since 1963 had seen a series of site managers, first called Management Assistants and later Unit Managers, who stayed for relatively short periods of time and then moved on. The period after 1976 saw more stable leadership. Roy Beasley, Jr., took the post early in 1977 and was succeeded by Loretta Schmidt in 1980. She was the daughter of Henry Schmidt, the popular superintendent of Fire Island and the New York City Group from 1967 through 1970. She stayed until 1987, a long tenure by NPS standards. Her successor, Diane Dayson, remained until 1990. Dayson's successor, Vidal Martinez, served from 1991 to 2000.

During the park's 40-year history, no superintendent has been as controversial as Loretta Schmidt. Park staffers whose memories stretch back to the late 1970s remember her tenure as a difficult time, and her as a micro-manager with a temper.[1]

Personalities aside, this period marked the establishment of a tradition of sorts: Sagamore Hill became, in the words of Maintenance Mechanic Willy Stein, a "training park" – a place to send new superintendents to learn the craft.[2] Schmidt was a first-time superintendent: so, later on, were Diane Dayson, Vidal Martinez, Lorenz Fong, and Gay Vietzke – every superintendent since 1980. Some of Sagamore Hill's superintendents have been strong and capable leaders. Nevertheless, a system of this kind, once institutionalized, might be expected to put some strain on park staff. "Sometimes," as Willy Stein puts it, "that training park needs a break." By the late 1980s, Sagamore Hill needed a break.

Compared with those that precede and follow it, the history of this period is rather poorly documented. During the 1980s, documents appear to have been preserved with less care than formerly. In the late 1980s, there were also problems with administrative staff.[3] These factors may explain the relative dearth of documents, a condition that makes it difficult to recover many details of the period's history. Some important contributions have surely faded from view. Curator Amy Verone notes that her predecessor, Gary Roth "did a lot of great work" at the beginning of this period: unfortunately, this and possibly much else can no longer be recovered from the documents.

Caring for Sagamore Hill

The broad outlines of Sagamore Hill's history between 1976 and 1990 can nonetheless be traced. They are those of a park whose course, at least for the moment, has been largely set. The dominant themes are no longer those of establishing, planning, and developing, but of managing and maintaining a park: the subjects of this chapter. And though there were important initiatives, aimed especially at protecting the park's boundaries and caring for its collections, the emphasis had shifted from the launching of new projects to the working out of existing ones.

Several reasons for this shift can be mentioned. First, systems and components that were already aging when the Park Service took ownership of the park in 1963 were demanding increasing attention 10 and 20 years later. These included the intricate wooden exterior surfaces of the Theodore Roosevelt House, as well as its lighting and

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[1] George Dziomba and Willy R. Stein, recorded interviews with the author, December 7, 2004; recordings at Sagamore Hill.

[2] Stein, recorded interview with the author, December 7, 2004.

[3] Dziomba and Stein, recorded interviews with author, December 7, 2004.

heating systems. By the 1980s, too, the agency was reassessing the interior restoration and furnishings inherited from the Theodore Roosevelt Association, and finding fault in areas where it had previously bestowed praise. A second reason relates to the impact of agency-wide and regional initiatives, particularly in the area of collections management. In 1963, the high degree of integrity, as well as the good condition, of Sagamore Hill's collections had been widely noted as one of the park's strengths, and the collections neither required nor received much attention during the following decade. But by the 1980s, efforts to upgrade the cataloging and conservation of collections throughout the NPS resulted in the establishment of museum standards higher than those previously in force at the park. Sagamore Hill's collections were among the largest and most important in the Northeast Region: cataloging and conservation programs became an important part of the parks' work plan.

The Planning Deficit

The third reason has to do with the rhythm of planning at the park. At an idealized park, an initial phase of intensive planning would be followed by a period of implementation. Superficially, Sagamore Hill conforms to this model. But the reality was more complex, because the initial planning phase had not produced an accepted master plan. By the mid-1970s, planning efforts had led not to clarity but to confusion. While it is true that park managers and regional officials no longer had to devote significant time and energy to planning, this was a mixed blessing, since the lack of planning direction inhibited their ability to take on major initiatives.

In 1977, shortly after the new superintendent's arrival at Sagamore Hill, the Northeast Regional Office assessed the planning situation.[4] The resultant "Outline of Planning Requirements" pointed out that the major recommendations of the park's most recent planning document (the *Interpretive Prospectus*) flowed from two assumptions: first, that the Stable and Lodge (as well as other vanished elements) would be reconstructed; and second, that a visitor center would be built "in the heart of the historic site." Both were hypothetical, and as a result, every interpretive activity launched at the park since 1970 had of necessity to be considered "temporary." There was a more serious problem. As the "Outline" declared, the basic assumptions were invalid: they were no longer "in harmony with current National Park Service policy."

It is not difficult to deduce what lay behind this reassessment. In 1975, the service's chief of interpretation had announced that the National Park Service would no longer build visitor centers where they might "impinge on a visitor's limited time in a

[4] "Outline of Planning Requirements"; Northeast Regional Office, Boston (NERO), Files of the Planning Program. The document appears to be a draft, dated May 20, 1977, and is unsigned by either the superintendent or the regional director.

park."[5] At the same time (as described in Chapter 6), historians and others within the agency were looking more skeptically at the value of reconstructions: as the park's *Historic Resources Management Plan* of 1975 reported, "current National Park Service policy concerning reconstructions appears to preclude" reconstructing the Stable and Lodge.[6] With these central elements in Sagamore Hill's development prospects off the table, the "Outline of Planning Requirements" now called for a new interpretive plan. Three years later, a *Statement for Management* suggested reconsidering both features "in light of current National Park Service policy."[7] But no clear instructions were forthcoming. The park had been left without planning direction on its most vital development issues. The planning deficit described by the planning outline extended beyond profound uncertainty over major landscape elements within the park. The assessment also noted the need for an accurate map of park boundaries. Finally, it detailed significant planning needs with regard to the Theodore Roosevelt House. While historic structure reports had been done on a "piecemeal basis," it said, the lack of accurate information in areas such as "paint colors, wallpaper designs, and wood finishes" had caused delays in essential maintenance. The park needed a full historic structure report. It also needed a historic furnishings study to "guide future restoration and routine replacement of worn items." It needed studies of carrying capacity and of fire and security protection.

The planning deficit continued to pose real problems for park managers throughout the next decade and, indeed, right down to the present. Regional and park officials called repeatedly for a master plan. In 1984, the regional office placed Sagamore Hill on a priority list for a new master plan; three years later, senior park staff and regional planners assessing its contents covered many of the same issues as the 1963 plan: "grounds restoration," reconstruction of vanished features, "vista re-creation," and a visitor center[8] But no plan was forthcoming.[9]

The planning deficit made itself felt in key aspects of park operations. In 1985, park staff and regional conservators had to refer a dispute over paint colors to Regional

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[5] William C. Dunmire, quoted in Barry Mackintosh, "Interpretation in the National Park Service: A Historical Perspective" (NPS History Division, 1986), pp. 50-51.

[6] J. Brown, J. DeMarce, and P. Steele, *Historic Resources Management Plan*, *Sagamore Hill* (U.S. DOI, NPS, December 1975), p. 43.

[7] *Statement for Management*, *Sagamore Hill National Historic Site* (Oyster Bay, NY: U.S. Department of the Interior (DOI), NPS, Sagamore Hill NHS, 1980), p. 9.

[8] "General Management Plan Scoping Meeting," September 9, 1987; NERO, Files of the Planning Program.

[9] Memorandum, Chief of Planning and Design to Superintendent, n.d. [May 1, 1984]; Federal Record Center, Waltham, MA, Acc 79-93, Box 4, File D-18 SAHI 1984. Also "General Management Plan Scoping Meeting," September 9, 1987; NERO, Files of the Planning Program.

Historian Dwight Pitcaithley for resolution because, as a conservator commented, "no set policy has previously been followed at the park or articulated in a general management plan."[10] In the same year, the need to renew or cancel the park's concession contract forced administrators once again to confront the question of a visitor center. The difficulty of deciding among the many possible options underlined yet again the need for a general management plan, and in 1985, the regional office urged once more that "priority consideration" be given to funding one.[11]

In 1992 the concession issue again "brought to the forefront" the need for a general plan.[12] The issues were the same: to renew or cancel the contract, to build a visitor center or renovate the existing concession building. Once more, the park's superintendent asked for a master plan.[13] An operations evaluation team visiting Sagamore Hill that year promised to be "alert to park planning needs"; they would see whether something "less encompassing" than a general management plan "could satisfy certain interim needs and contribute to park development" until funds become available for a "full-fledged General Management Plan effort." That effort would wait another decade.

In addition to the major landscape questions, the Theodore Roosevelt House presented its own planning needs. In December 1982, the park gave its highest priority rating to a "10-238" (the form used for a project proposal) for a historic structure report for the Theodore Roosevelt House, explaining that its interior restoration program, launched two years earlier, could not continue without being able to distinguish "original fabric from the 1950 TRA restoration."[14] Superintendent Schmidt reiterated the call in 1984 and again in 1987: when the TRA opened the house, she said, "it was improperly 'rehabilitated' and extensively altered." The work was not in accord with

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[10] Memorandum, Reply to Attn of Architectural Conservator, to Chief, Historic Preservation, October 23, 1985; SAHI: Curatorial Files, Folder: TRH Painting Project 1995.

[11] Memorandum, Chief, Planning and Development, to Chief, Program and Budget, n.d. [ca. May 1985], with attached 10-238 form dated September, 1984; Federal Record Center, Waltham, MA, Acc 79-93 0003, Box 2, Folder: A-6427 - SAHI - 1984.

[12] "10-238 Proposal – General Management Plan, Sagamore Hill NHS," n.d. [late 1993]; Northeast Museum Services Center, Files of the Regional Curator, Folder: Sagamore Hill NHS, Management Objectives Workshop, November 9-10, 1993. For the 1992-93 *Master Plan* effort, see also "Sagamore Hill NHS Management Objectives Workshop," November 9-10, 1993; SAHI: Central Files, Folder A6419.

[13] Memorandum, Acting Regional Director Steven H. Lewis to Superintendent, January 24, 1992; SAHI: Curatorial Files, Folder: Ops. Evaluation.

[14] "10-238 Proposal for Historic Structure Report," December 1982; Federal Record Center, Waltham, MA, Acc 79-83 0003, Box 4, Folder: D18 - SAHI-1984.

current standards, yet agency policy blocked further restoration or reversal of the earlier changes without a more detailed historical analysis.[15]

Large parts of a historic structure report were in fact drafted in 1987-88, but now a fine point of NPS operating procedure exacerbated the planning deficit. The historic structure report was put aside before being completed: because it was not completed, no copy was sent to the park. Under ordinary circumstances this might have been merely annoying. But the Harpers Ferry Center was at work on an ambitious refurnishing plan that would subject every major room in the Theodore Roosevelt House to searching review. A few years later, park staff began preparing to implement the wide-ranging changes proposed in the refurnishing plan, but discovered they did not have the necessary architectural documentation. They then requested, and received, copies of the unfinished historic structure report.

It was at about this time that the planning deficit appears to have reached its greatest depth. Curator Amy Verone recalls that, when she arrived at Sagamore Hill in 1991, copies of the 1963 *Master Plan* had disappeared from the park's files, and its contents – even its existence – had faded from park memory. She recalls that senior park staff had to reinvent much of its contents. When it was unearthed, it proved to be durable enough, despite the passage of almost 30 years; the *Resource Management Plan* of the following year could claim that "all park activities" were based on it.[16] Still, Curator Verone notes that it was painfully obvious that the plan's landscape recommendations had never been implemented and badly needed reconsideration.[17]

The long-lasting planning deficit is now being filled: a new general management plan is being written. But for the superintendents who managed Sagamore Hill after 1975, the incomplete state of the park's planning documents was a recurrent problem that shaped the character of those years by making it effectively impossible to resolve the park's most challenging issues of layout, development, and visitor services. Not that major initiatives were entirely lacking: a land protection plan addressed important issues of boundary protection, while the curatorial area saw a series of important developments culminating in a refurnishing plan. But on the whole, the period of the 1970s and '80s was one of management and maintenance.

It was also, finally, the period when deep and persistent budget shortages became a regular part of life at Sagamore Hill. Inadequate budgets began to be noted with regularity during the early 1980s, and they colored many aspects of the park's work.

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[15] Development/Study Package Proposal for Historic Structures Report, August 27, 1987; Northeast Museum Services Center, Charlestown Navy Yard (NMSC), Files of the Regional Curator, Folder: SAHI - Prepare HSR.

[16] Chief of Visitor Services and Chief of Museum Services, Sagamore Hill NHS, *Resource Management Plan, Sagamore Hill National Historic Site* [draft] (U.S. DOI, NPS, 1992).

[17] Amy Verone, interview with the author, February 4, 2004.

Unfortunately, their deepest impact was in just the areas that now were claiming the staff's greatest attention, for while certain new initiatives – landscape studies, refurnishing plans, cataloging projects – could be funded through external budget lines, the park's core operations could not. Tight budgets led to shortages in personnel and materials, which in turn led to difficulties in maintaining buildings, landscaping the grounds, and managing visitors.

Handicapped by inadequate financial resources as well as a planning deficit, park staff nonetheless managed to operate Sagamore Hill, maintaining the physical fabric of buildings and landscape, upgrading utilities, cataloging and conserving collections, managing visitors, and interpreting the park. This chapter focuses on these topics. While it concentrates on the period between about 1976 and 1990, it touches on events both earlier and later whenever they are important to the narrative.

PRESERVING THE THEODORE ROOSEVELT HOUSE

Everyone who took part in the campaign to acquire Sagamore Hill, from the Park Service's technical experts through the U.S. Congress, agreed that Sagamore Hill was in remarkably good condition, and that its fine state of preservation greatly enhanced its value. But keeping it that way required constant attention. From the very moment it passed into the agency's hands, Sagamore Hill's physical plant presented challenges for its new owners. As master planning proceeded, agency experts, including architects, horticulturists, and civil engineers, assessed what was needed.[18] At the Theodore Roosevelt House, some windows fitted so loosely that vibration from storms had actually broken panes.[19] The main porch needed rehabilitation; repointing of masonry was "urgently needed...to avoid serious future restoration problems." Inside, the experts recommended stabilizing the main staircase and patching, resurfacing, and painting walls. A historic structure report completed in 1964 put the total for all of this work at $79,700.[20]

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[18] Memoranda, Regional Architect John B. Lukens to Chief, Division of Operations and Maintenance, December 9, 1963, and February 12, 1964; Civil Engineer George F. Lucko to Assistant Regional Director, Operations, May 20, 1964; and Horticulturist Bruce Arnzen to Assistant Regional Director, Operations, June 2, 1964; NARA - Philadelphia, Box 9, Entry 414, 1953-1964.

[19] Memorandum, Lukens to Chief, Division of Operations and Maintenance, December 9, 1963.

[20] Norman M. Souder, *Historic Structures Report, Part II (Portion), Architectural Data Section on Sagamore Hill, Restoration of Porch, Stabilization of Staircase, Masonry Pointing and Painting* (U.S. DOI, NPS, Eastern Office, Design and Construction, Division of Architecture, August 1964; SAHI: CRBIB, Box 8. For a more detailed account of maintenance and restoration work carried out over the years, see Marie L. Carden, with Richard C. Crisson, *Sagamore Hill, Home of Theodore Roosevelt: Historic Structure Report* (Boston, MA: U.S. DOI, NPS, North Atlantic Region, Cultural Resources Center, Building Conservation Branch, 1988).

The challenges of maintaining Sagamore Hill can be divided for the sake of clarity into three categories: warding off the effects of aging, safeguarding the house's contents against theft, and protecting it from catastrophic destruction by fire. Each involved some combination of direct physical intervention in the fabric, management of visitors, and upgrade of mechanical systems. In addition, programs to catalog and conserve the collections contributed to the larger protective effort: because they owed much to national and regional museum initiatives, they are covered separately.

Painting: a Recurrent Challenge

From the beginning, NPS architects observed that the Theodore Roosevelt House badly needed painting,[21] and maintaining its elaborate exterior surfaces would offer recurring challenges throughout the period under review and beyond. Paint scrapes carried out in 1964 revealed as many as 12 layers of colors on the shingles.[22] Some exterior work was performed in 1967: we know this only because Management Assistant John Neckels called the repainting of 1970 "far superior" to it.[23] This repainting was carried out by a local Sears Roebuck Company contractor, working to specifications developed by the NPS, in particular restoration specialist Bobby Flickenger. The colors were pewter gray (porch and deck), green (trim), and cream (shingles).[24] Superior though it might have been, cost quickly became an issue as the time required for surface preparation stretched on. "The work is more than merely painting a building," reported Superintendent Jerry Wagers to the regional director: "it approaches rehabilitation...." The cost eventually reached or exceeded $26,000, and Regional Chief of Maintenance Nathan Golub commented to Chief of History & Historic Architecture (WASO) Thomas Crellin that "While it's reassuring to know we're getting an historically 'pure' job, I tremble to think how little we would accomplish in maintenance if we were bound to adhere to such rigid specs in all instances. There has to be a degree of pragmatism in our maintenance of historic structures if we are to accomplish anything with our available (and inadequate) funding. That's life!"[25]

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[21] Thomas M. Pitkin, *Historic Structures Report, Sagamore Hill National Historic Site, Part I, Administrative Data* (U.S. DOI, NPS, October 1964; SAHI – CRBIB, Box # 7.

[22] Memorandum, Penelope Hartshorne to Norman Souder, "Paint Colors Originally at Theodore Roosevelt's House, Sagamore Hill, Built in 1884," July 13, 1964; SAHI: CRBIB, Box no. 8.

[23] Memorandum, Management Assistant John W. Neckels to Assistant Superintendent, Manhattan Sites, September 23, 1970; NPS Library.

[24] Brown, DeMarce, and Steele, *Historic Resources Management Plan*, p. 26.

[25] Memorandum, Nate Golub to Tom Crellin, September 30, 1970; NPS-WASO, Park History Files.

The issue here is less obvious than it seems. Golub interpreted the problem as a too-finicky standard of restoration. But the delays in completing the surface preparation suggest that the workmen may have found the exterior surfaces in worse condition than predicted.

The problem of maintaining the house in Oyster Bay's seaside climate continued to challenge the house's new owners. Some restoration work was done on the porch in 1982; in 1984-85 the gutters were repaired and the TRA-era asbestos-shingle roof was replaced with wood shingles at a cost of about $195,000.[26] But the biggest recurring need was painting. In 1975, the *Historic Resources Management Plan* recommended repainting every five years as part of a preventive maintenance program.[27] Though a later account comments that the program was never implemented,[28] the house seems to have been painted twice between 1970 and 1981 – how completely is not clear. There was some dissatisfaction with the results.[29] In 1981, the Sears corporation asked the park to agree to use its paints exclusively: the company would advertise it as one of the "Sears family of 'Great American Homes.'" But Superintendent Schmidt and regional officials took the opportunity to point out the failure of previous paint jobs in which Sears paints had been used. Besides, Sears could not provide a perfect match with the historic colors. The 1975 *Historic Resources Management Plan* had urged the staff to purchase a Munsell color book, and this was apparently done. Meanwhile, Blaine Cliver, the region's Chief of Historic Preservation, had recommended using Benjamin Moore paints.[30]

A major repainting in 1985 brought the issue of color selection to the forefront. Together with the new roof, woodcrafter George Dziomba describes it as the most visible project in almost 30 years at the park.[31] This was largely because it introduced what contemporary accounts described as a "radical change" in the house's appearance. Until 1985, the Theodore Roosevelt House had worn the colors it had assumed some time around 1948, long after Roosevelt's death – a scheme centered on mustard-yellow walls. Now conservators argued for a return to the colors of the later presidential years, a suit of gray over salmon-red brickwork that it had first put on about 1906. They believed this was the "most complete" color scheme representative of the presidential years, and it had remained on the house for the rest of Roosevelt's life and beyond. The proposed new treatment relied on microscopic paint analysis carried out by conservators

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[26] Annual Report, 1985.

[27] Brown, DeMarce, and Steele, *Historic Resources Management Plan*," p. 25.

[28] Carden with Crisson, *Historic Structure Report*, p. 297.

[29] According to Superintendent Schmidt (memorandum, January 26, 1981; NMSC, Files of Regional Curator, Folder: H30-SAHI.

[30] According to memoranda in Files of the Office of Regional Curator; NMSC, File: H30-SAHI.

[31] George Dziomba, recorded oral interview with the author, December 7, 2004.

from the Northeast Region's Building Conservation Branch: their research confirmed that done by Penelope Hartshorne as long ago as 1964. "Having had this information in hand for twenty years," advised conservator Andrea Gilmore, "it seems time for the National Park Service to make the change."[32]

Meanwhile, Gray Cottage was also to be repainted. The conservation experts had concluded that the best solution for Gray Cottage was (not surprisingly) gray, with green trim: the original colors of 1910. Since the proposed color scheme for the Theodore Roosevelt House was that which had been in force at the time both Gray Cottage and the North Room were built, the proposed changes would give all of these elements a historically consistent appearance.[33] But Superintendent Schmidt protested the decision: she wanted the cottage left alone. In the absence of a master plan or similar controlling document, the controversy was referred to Regional Historian Dwight Pitcaithley. "It is not the intention of the park," reported a conservator for the region, "to restore the Cottage exterior to a time period compatible with the main house." That, of course, was exactly what the conservators wanted to do. Pitcaithley sided with the conservators: "The building exteriors should be visually compatible with the Theodore Roosevelt historic scene."[34]

In 1995, the house was painted again. The colors were those of 1985, but the experience resembled that of 1970. Even before the work began, considerable damage was noted, including "extensive deterioration of various architectural elements" such as siding, trim, porch and piazza railings, windows and sashes, storm windows, doors and frames.[35] When the project started, Building Conservation Branch staff found "an enormous amount of work, more than we had anticipated":[36] nearly the entire surface required scraping, and a need for preservation carpentry was anticipated as well. The

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[32] Memorandum, Architectural Conservator Andrea Gilmore to Superintendent Schmidt, January 28, 1985 (reproduced in Carden with Crisson, *Historic Structure Report*, pp. 344-45). The new color scheme was presented to the TRA by Gilmore (Memorandum, Chief of Historic Preservation to Associate Regional Director, D & RP, March 5, 1985; Federal Record Center, Waltham, MA, Acc 79-93 0003 Box 7, File H-18 SAHI 1984). See also Memorandum, Gilmore to Chief, Historic Preservation, E. Blaine Cliver, March 5, 1985; SAHI: Curatorial Files, Folder: TRH Painting Project, 1995. For the resolution of the controversy between Superintendent Schmidt and the conservators, see Memorandum, Reply to Attn of Architectural Conservator, to Chief Historic Preservation, October 23, 1985; SAHI: Curatorial Files, Folder: TRH Painting Project 1995.

[33] Memorandum, Gilmore to Cliver, March 5, 1985; SAHI: Curatorial Files, Folder: TRH Painting Project 1995.

[34] Memorandum, Reply to Attn of Architectural Conservator, to Chief, Historic Preservation, October 23, 1985; SAHI: Curatorial Files, Folder: TRH Painting Project 1995.

[35] Building Conservation Branch, Cultural Resources Center, Division of Cultural Resources, Management Task Directive, Exterior Paint and Repair at Sagamore Hill, February 1995 (prepared by Historical Architect Richard C. Crisson: SAHI: Curatorial Files, Folder: TRH Painting Project 1995.

[36] Memorandum, Exhibit SpecialistTom Ballos re SAHI Exterior Painting, August 7, 1995; SAHI: Central Files, Folder: H30.

normal deterioration of exposed elements was one problem. But conservation experts also faulted "a couple of previous paint projects that were not properly applied."[37] The piazza was in particularly bad condition, due to a heavy use of silicone caulk that had prevented the full drying of the wood after rain. The condition of windows varied: most required only modest repair, but 75% of those in the Trophy or North Room had to be replaced. The job was finished in 1996 at a cost of $163,683 in Gross Work Order or Field Costs.[38] Cultural Resources Center staff did most of the job, but to keep costs down, park maintenance staff and volunteers painted 156 exterior shutters.

Managing the Impact of Visitors

During the 1970s, the impact of visitors on the Theodore Roosevelt House began to worry park staff. Unlike the problem of exterior maintenance, which can never be finally solved, that of visitor impact was largely addressed in 1993.

Park staff formulated the problem as one of capacity: how many visitors could the Theodore Roosevelt House accommodate without endangering them or the house itself? Visitation figures suggested that there was cause for alarm.[39] In 1963, 42,722 visitors were counted in the house. The following year – the first full year of NPS stewardship – the number rose to 82,222, and it continued to rise each year, reaching 123,678 in 1968. During the next few years, admissions figures wavered but generally grew, reaching 132,438 in 1973. The following year, the Park Service changed its method of counting visitors. Until then, visitors had been counted inside the house: henceforward, the number of vehicles leaving the parking field would be multiplied by the average number of occupants per vehicle. This figure would then be added to the group visitation figure to yield an approximate total of visitors to the park as a whole. Totals of 165,018 visitors in 1975 and more than 183,000 in 1980 therefore may not represent significant increases in the number of people actually passing through the Theodore Roosevelt Home. Yet NPS staff considering the problem during the 1970s would have seen a history of steadily rising visitors and, prudently, predicted more of the same.

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[37] Tom Ballos (Exhibit Specialist), Project Status Report, Exterior Preservation Carpentry and Painting of the Theodore Roosevelt Home, November 12, 1995; SAHI: Curatorial Files, Folder: TRH Painting Project, 1995.

[38] Tom Ballos (NE System Support Office), "Completion Report: Sagamore Hill Paint and Carpentry Repair," March 1995–June 1996; SAHI: CRBIB, Box # 10.

[39] Visitation figures up to 1975 are drawn from Brown, DeMarce, and Steele, *Historic Resources Management Plan*, pp. 15-16. Later figures are generally included in park annual reports, but do not appear to be available for 1976-79. From 1979 onwards they are available on the website of the NPS's Public Use Statistics Office at www.2/nature.nps.gov/mpur/index.cfm. See Appendix N.

The pattern they saw was, of course, the same pattern that had impelled Conrad Wirth to launch Mission 66: rising public use putting increasing pressure on parks. Ronald Lee had recognized it, too: "We seem," he told an audience of park officials in 1961, "to be entering a period in which central questions facing our Service will be what constitutes proper and compatible public use of a National Park, and how much public use there can be without destroying it."[40] At Sagamore Hill, the problem was recognized by 1970,[41] and NPS staff urged establishment of a "realistic carrying capacity" in 1975, 1977, and 1980.[42] Although fire regulations imposed a ceiling of 125 occupants, that number seemed to be "in excess of what the Theodore Roosevelt Home can comfortably accommodate at once." Floor structures that had never been reinforced were a particular source of concern.

The issue of visitor impact was not solely one of capacity: attention also focused on how visitors moved through the house. Until 1981, fees were collected and visitors oriented inside the front hall, but in 1981, after the information kiosk was refurbished and moved to the parking lot, it became possible to conduct these operations outside the house, at least for two months of the year. This mitigated the impact of visitors, thought it fell far short of a real solution to the problem of "inappropriate and overuse [*sic*]" of the house. In addition to a realistic carrying capacity, the park needed a "control point" to regulate the number of visitors inside the house at any one time.[43]

Whether the problem of over-capacity became more severe during the 1980s is hard to say. A total of 135,492 in 1988 was described as a significant rise, even though it appears to be less than the numbers recorded in 1980. Visitation was logged at over 160,000 in both 1989 and 1990. It is difficult, in sum, to tell whether total visitation was continuing to rise or not. But in 1988, park staff noted a dramatic increase in school groups, which now totaled over 300 per year. This in itself would have constituted a significant impact on the house's structure.

The problems of capacity and visitor control were finally solved in 1993, following the refurnishing of the Theodore Roosevelt Home. When the house reopened after a six-month closure, visitors found access limited to guided tours. Henceforth they would be allowed in the house only in tightly controlled numbers, and under supervision. Meanwhile, the rehabilitation of the concession building into a small visitor

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[40] Ronald F. Lee, "Comments on the Role of Interpretation in the National Park Service," February 16, 1961 9, pp. 3-4; NARA - Philadelphia, NPS NE Office Papers.

[41] See *Interpretive Prospectus*, 1970, pp. 4-5; SAHI - CRBIB - 010473.

[42] Brown, DeMarce, and Steele, *Historic Resources Management Plan*, p. 17. Also "Outline of Planning Requirements," May 20, 1977; North Atlantic Regional Office, Boston (NARO): Planning Program Files). Also *Statement for Management, Sagamore Hill NHS*, 1980; SAHI Central Files, A 6419.

[43] "Visitor Use Plan," October 1983, p. [1]; NARO: Planning Program Files.

center allowed ticket sales to be moved out of the house. These changes are discussed more fully in Chapter 6.

As park staff searched for ways to manage the impact of visitors, Congress created a new access requirement, passing the Americans with Disabilities Act (ADA) in 1990. The Americans with Disabilities Act required public buildings to provide access to wheelchair-bound and other disabled visitors. Already in 1988 an operations evaluation report at Sagamore Hill had recommended that Old Orchard Museum be made accessible to people with disabilities,[44] and some study was devoted to expanding access to the Theodore Roosevelt Home, as well. In 1990, plans were developed for an exterior lift to bring wheelchairs up to the entrance porch. They were funded the following year, but the regional office blocked them, judging the impacts on the house and its environs too severe. Besides, while the improvements would have made access to the first floor more convenient for the wheelchair-bound, they would have done nothing to open up the house's upper floors. In 1992, new park management proposed an ingenious and less-intrusive solution: to install a wheelchair ramp at Old Orchard, and then to produce a video tour of the Theodore Roosevelt Home that could be played there. This solution accepted the likelihood that the upper floors of the Theodore Roosevelt Home would remain beyond reach of wheelchairs, and made it possible to justify continued reliance on a movable ramp for access to the main floor.[45] Today, a moveable ramp continues to be used at the Theodore Roosevelt House, and in 2004, as part of a larger rehabilitation, the main floor of Old Orchard Museum was made accessible to wheelchairs through a permanent ramp at the back of the building.

Mechanical Systems

Like its historic fabric, the Theodore Roosevelt House's mechanical systems required immediate attention, particularly its vitally important safeguards against fire and theft. Within months of NPS acquisition, the agency installed a new alarm system and new fire extinguishers.[46] Still, both fire- and theft-prevention remained ongoing areas of concern. Precautions against theft were less than fully effective. Until 1993, visitors circulated freely through the house, and the third-floor rooms (except for the Gun Room) were protected only by cord barriers that could be "unsnapped or bypassed by visitors." The doorways to some second- and third-floor rooms also had pressure-sensitive mats that rang alarms. But between 1965 and 1975, 21 "minor thefts" were

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[44] *Operations Evaluation, Sagamore Hill NHS: Final Report* (U.D. DOI, NPS, November 1988); SAHI: CRBIB, Box No. 3.

[45] Chief of Visitor Services and Chief of Museum Services, *Resource Management Plan*, p. 54.

[46] Correspondence, October-November, 1963; NARA - Philadelphia, NPS Northeast Office General Correspondence 1952-66, Entry 414B, Box 4).

counted – most of them from the third floor. A design for new room barriers was proposed in 1972: it was one of the items that aroused the Theodore Roosevelt Association's ire and it was not immediately implemented, but after the controversy subsided, new barriers were announced,[47] and they appear to have been installed about 1976. Still, the 1990 theft of one of Roosevelt's guns – a misfortune that prompted concern as far away as the Washington office – showed that the problem of theft had not been solved. Quite the contrary, the park's 1988 *Operations Evaluation* called theft the most serious threat to the collections.[48]

Studies carried out during the next few years proposed various remedies. The *Operations Evaluation* noted that understaffing hampered every aspect of the park's work, and called for an increase in Visitor Services staff as an essential measure. It was not provided, but by 1992, following the recommendations of a security survey report prepared by an outside contractor, nighttime security lighting was upgraded,[49] and task directives were approved for new motion detectors, curtain alarms, and lock boxes.[50] That year, the park's *Resource Management Plan* estimated that a further $125,000 would be required to improve security lighting at Old Orchard Museum, the maintenance shop area, parking areas, and concessions stand; to upgrade the existing power panels; and to install a vehicle detector that would turn on security lights when cars entered the property after hours.[51] But the biggest improvement in security was achieved, once again, through the limitation of visitor access to guided tours in 1993: no longer free to roam the house, visitors would henceforth be supervised by staff or volunteer docents.

While thievery nibbled at the park's collections, fire might consume them in a single blaze. The house's fire-protection system relied on a 100,000-gallon underground reservoir installed by the TRA. Fed by wells, the reservoir supplied hydrants and a sprinkler system in the basement and part of the first floor of the Theodore Roosevelt House. While it was generally considered adequate, almost every other aspect of the system represented a potentially weak link. In 1983 a new water line was run from the pump house to the staff quarters adjacent to Old Orchard, a distance of well more than 1,000 feet[52] (see Fig. 27). Two years later, a contract was awarded to rewire and upgrade fire- and burglary-alarm systems at both the Theodore Roosevelt Home and Old

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[47] Brown, DeMarce, and Steele, *Historic Resources Management Plan*, pp. 17-18.

[48] *Operations Evaluation* (see esp. Chapters V, VIII, IX, and Ixa.); SAHI: CRBIB, Box No. 3. See also Vidal Martinez, recorded interview with author, January 14, 2005.

[49] Chief of Visitor Services and Chief of Museum Services, *Resource Management Plan*, p. 48.

[50] Task Directive, Security Upgrade, January 10, 1992; SAHI: Central Files, Folder: H 20.

[51] Chief of Visitor Services and Chief of Museum Services, *Resource Management Plan*, p. 48.

[52] Drawings in the Denver Service Center (DSC) Technical Information Center, dated 1982, document the project; "Sagamore Hill NHS: Upgrading of Water and Fire Protection System").

Orchard Museum.[53] But false alarms continued into 1986, and a private contractor was hired to analyze the fire-alarm system. He found it deficient: almost all of the detectors were aging and dirty, and some were poorly located. Recommendations were offered for maintaining the system in such a way as to prevent further false alarms.[54] Yet the 1988 *Operations Evaluation* reported false alarms as a continuing problem.

By the early 1990s, fire had become a constant worry. In 1991-92, park staff and consultants studied the possibility of connecting the park's water supply to the public water system, a major engineering project that was undertaken after much preparation in 2000. Yet while there were other pressing reasons to do this, a 1992 report showed that it would not solve the problem of an inadequate fire-suppression system. Many of the old sprinklers were no longer operable and were beyond repair: they could not be counted on to perform effectively in a fire. New, automatic sprinklers and an upgraded fire pump were needed. But even with them, the realities of an aging wooden structure made a high degree of fire protection difficult if not impossible to obtain.[55] Tremendous crowds at the reopening of the Theodore Roosevelt House in 1993 led to new concerns. Curator Amy Verone, reported a news correspondent, "goes to bed every night worrying about whether the place is going to go up in smoke." John Gable shared her concern.[56] The house's fire-detection system was upgraded with more than 20 new detectors, and the sprinkler system was extended into the staff areas.[57]

As important as protecting the house against weather, fire, and theft might be, these challenges were straightforward compared with a perplexing problem that was attacking the house's fabric and collections every day. In 1963-64, the visiting experts had noted loosely fitting windows, deteriorating plaster, and other structural problems but had not diagnosed the cause. In 1970, the New York City Group asked regional experts Norman Souder and Bobby Flickinger to investigate further. The "obvious conclusion" was that the house's heating system was at fault. This was essentially the system created by the TRA in 1951: a new oil burner connected to the house's original hot-air ducts, with additional new ductwork to distribute more heat. Sometime after 1951 a propeller-type exhaust fan had been installed in the attic, with louvers in the ceiling of the third-floor

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[53] Annual Report, 1985. The contract for upgrading fire and intrusion alarm systems at TR Home was $183,152; a consultant had designed the project for $64,500.The work went slowly and with interruptions, with the Annual Report on poor supervision from the regional exhibit program.

[54] Robert P. Schifiliti, PE (Fire Data Systems, Inc., Lowell, MA), "Analysis of the Fire Alarm System at the Theodore Roosevelt Home," November 25, 1986; SAHI: CRBIB Box No. 3.

[55] Philip R. Sherman, Inc., "Sagamore Hill Fire Suppression Water Supply Analysis," October 6, 1992; SAHI: CRBIB, Box No. 4.

[56] Bill Bleyer, "TR's Mansion Called 'Terrible Timebomb,'" *Newsday*, November 25, 1993; clipping, SAHI: Central Files, Folder K34.

[57] Curator Amy Verone to the author.

stair hall. Now, in addition to the problems noted in 1964, the visiting experts observed cracked paneling, loose flooring, and deteriorating furnishings throughout the house. Even stair wedges installed since 1964 had shrunk and were falling out. The problem was the "extremely low humidity" produced by the heating system. Souder "strongly recommended" replacing it.[58]

Now followed a long and depressing struggle with the house's infrastructure, which continues even now to plague park staff. By the spring of 1971, the windows were repaired, and Flickinger was back to "examine other areas of the Home, which need prompt attention." Some problems were caused by visitors: worn flooring, "finger picked areas of wallpaper." The lightly built stairway would have to be rebuilt to sustain the impact of crowds. But Flickinger insisted that fixing the heating system was the highest priority. On February 24, the temperature inside the house had reached 98 degrees. The extreme dryness was destroying woodwork and furnishings throughout the house. To make things worse, air vents were directing a Saharan blast directly at paneling, drapes, and furniture. "All existing problems," said Flickinger, could be traced to the combination of excessive heat and dryness. And in the summer, humidity climbed to 75%, which simply exacerbated the problem.[59]

Flickinger now proposed a solution that was simpler than Souder's: install thermostats and humidistats, and set them correctly. Pan humidifiers appear to have been installed in 1973,[60] but they did not solve the problem. In 1974, "10-238" project proposal form was filed for an entirely new heating, humidification, and air-conditioning system.[61]

That fall, a Denver Service Center (DSC) Historic Preservation Team noted worsening conditions, while confirming the diagnosis. Oak paneling was cracking, plaster pulling away from lath, wallpaper peeling.[62] In 1975 the DSC studied the problem

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[58] Memorandum, Norman M. Souder to Thomas Crellin (Chief of History & Historic Architecture, Washington Service Center), April 3, 1970; NPS Library (copy also at Harpers Ferry Center, Papers of Ronald Lee, Box 9).

[59] Memorandum, Bobby Flickinger to Park Manager - Sagamore Hill, March 23, 1971; NPS Library, Legislation File.

[60] Dianne C. Jonassen, "Re-evaluation of the Climate Control System," Fall 1981; SAHI: CRBIB, Box No. 5.

[61] The actual 10-238 does not appear to have survived, but is referenced in a memorandum from Merrill J. Mattes of the DSC to Assistant Director, Park Historic Preservation, WASO, December 5, 1974; NPS Library.

[62] Memorandum, Merrill J. Mattes (Manager, Historic Preservation Team, DSC) to Assistant Director, Park Historic Preservation, WASO, December 5, 1974; NPS Library, File: Correspondence 1973-74.

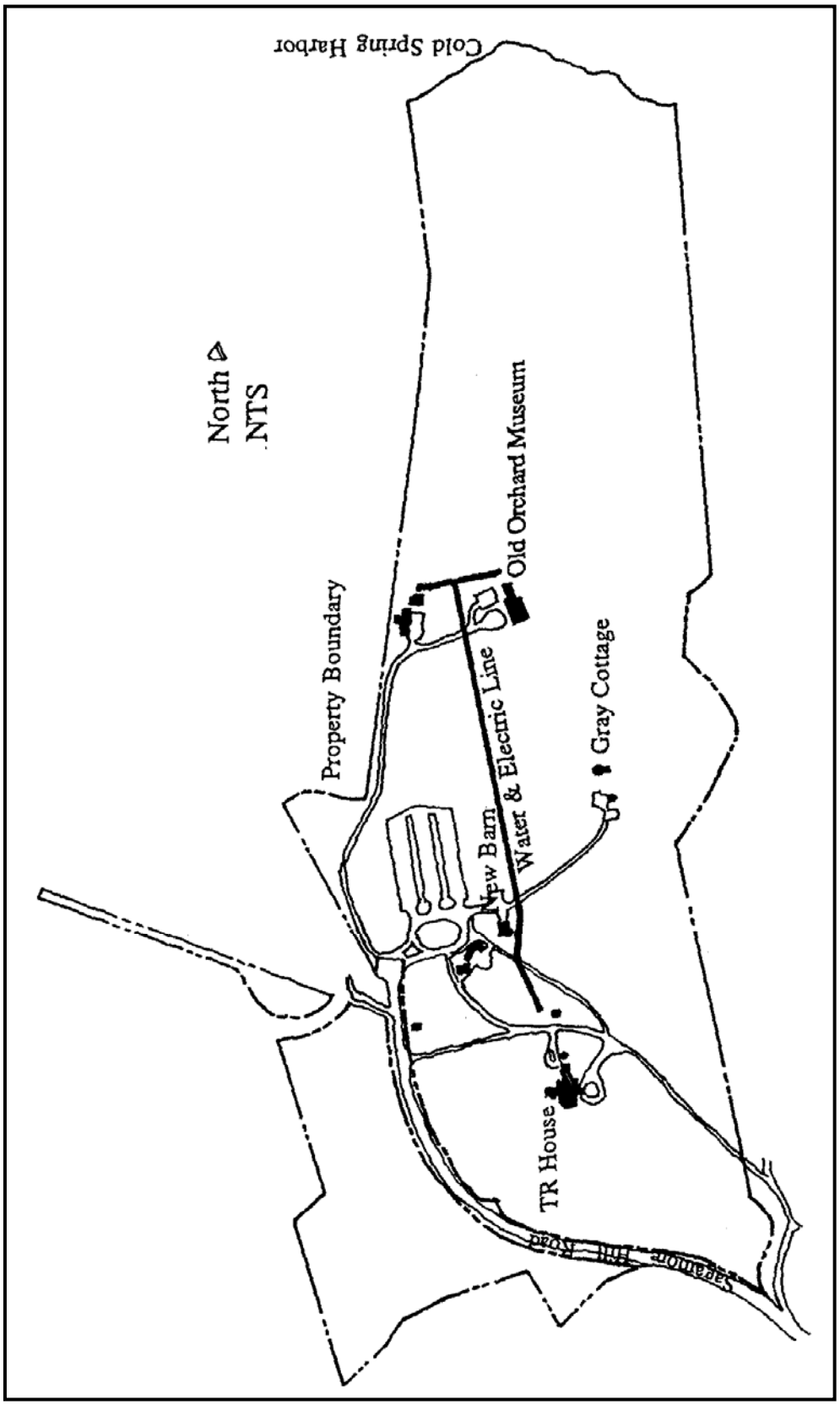

Fig. 27. Water and electric lines installed in the 1980s, as shown in a diagram prepared for the *Cultural Landscape Report*. (Reprinted from Bellavia and Curry, *Cultural Landscape Report for Sagamore Hill National Historic Site*, Vol. 1.)

more carefully.[63] Meanwhile, "cracking of wood paneling, deterioration of plaster, peeling of wallpaper, cracking of wood furniture and opening of glued joints, and drying and deterioration of leather book bindings" continued.[64] The *Historic Resources Management Plan* called for a new system capable of maintaining stable winter conditions of roughly 65 degrees with 40 percent relative humidity.[65]

The problem seemed to worsen with time, and so did the difficulty of solving it. In 1976-77 the heating system was upgraded with a new oil-fired boiler and air-handling units.[66] It did not help. In 1979 a new climate-control system was installed, including new air handlers, a new boiler, and a new humidifying unit. The system produced steadier conditions. But conservators discovered in 1981 that the humidity now was actually *lower*: a fairly consistent 30 percent. This was hardly progress. As the next study tersely put it, "...the system did not work properly."[67] Yet the discrepancy was hard to explain: more study was needed.[68] Early in 1982, Superintendent Loretta Schmidt – then in her second heating season at the house – pleaded with the regional director to put the problem "high on the list for immediate attention." The climate control system had become "counterproductive to our mission." The problems indeed had become ludicrous. The polarities had somehow gotten reversed on the thermostat controls; the contractor had refused to make a site visit, claiming that the system was "ill-conceived"; and so forth. The situation might have seemed comic if, as Schmidt put it, it had not become "CRITICAL to our maintaining fragile artifacts!"[69]

A decade later, Sagamore Hill's refurnishing plan was complete, and park staffers were preparing to empty the house and reinstall its contents according to the new plan. A good deal of effort had been devoted to conserving the house's fragile textiles, skins, books, and other objects, and park staff and conservators wanted to ensure that the house would provide a safe environment for them. They found that nothing had changed since Superintendent Schmidt's desperate plea for help. Museum Technician

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[63] Merrill Ann Wilson and Robert E. Thielke, *Historic Structure Report, Heating, Humidification and Air Conditioning, Architectural Data, Theodore Roosevelt Home, Sagamore Hill NationalHistoric Site, New York* (Denver, CO: U.S. DOI, NPS, Denver Service Center, Historic Preservation Team, February 1975); SAHI: CRBIB, Box # 8.

[64] Brown, DeMarce, and Steele, *Historic Resources Management Plan*, p. 46.

[65] Brown, DeMarce, and Steele, *Historic Resources Management Plan*, p. 46.

[66] Carden with Crisson, *Historic Structure Report*, pp. 90 and 282.

[67] Dianne C. Jonassen, "Re-evaluation of the Climate Control System," Fall 1981; SAHI: CRBIB, Box No. 5.

[68] Dianne C. Jonassen, "Analysis of the Climate Control System," November 1981; SAHI: CRBIB, Box No. 13.

[69] Memorandum, Schmidt to Acting Regional Director, NARO, January 26, 1982; SAHI: CRBIB, Box No. 5.

Alice Newton warned yet again of "fluctuating and excessive temperatures and humidity."[70] The regional conservator believed that sharp fluctuations in humidity continued to constitute the "greatest threat" to the house and its contents. The humidification system had entirely ceased to work: the blower carried on, but to what purpose was unclear. Wide fluctuations in temperature and humidity continued to cause cracks in paneling, separation of wood trim from walls, and loose or buckling floors. Unbelievably, a new evaluation was called for.[71] In 1993, as plans were being readied for the restoration of the upstairs rooms and hallways, Steven Spaulding, supervisor of the regional Building Conservation Branch, called attention to the problem yet again: some of the damage was "extreme," and Spaulding called for "immediate action" from the Building Conservation Branch and the North Atlantic Region.[72] In 1994, park staff applied for funds to upgrade the system. They applied again in 1995, and again in 1996. Humidity was now dropping as low as 5 to 10 percent in winter, and soaring in summer above 90 percent. Each winter the humidification unit – such as it was – could be counted upon to break down not once but as many as three times.[73]

The problem of Sagamore Hill's heating system remains unsolved. It is worth asking why it has been so severe. One factor is that the TRA's furnace was simply too good at producing heat. During Roosevelt's time, the house had been cold in the winter. "We have plenty of coal," Mrs. Roosevelt wrote in 1918, "but a bird cage is hard to heat."[74] Though radiators were installed in some rooms during the 1920s, it probably remained – like most houses through history – a chilly place in winter. Then came 1951. As an expert studying the problem 30 years later put it, "The new heating system...altered the environment so significantly that the objects and the structure suffered."[75]

Why the problem has proven so difficult to fix is an equally interesting question. Maintenance Mechanic Stein explains[76] that the new components installed in 1979 were not designed to produce a specific humidity, but merely to increase it by a certain percentage over conditions outside. On cold, dry winter days, that percentage was

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[70] Memorandum, Newton to Acting Chief, Division of Conservation, July 29, 1992; SAHI: Curatorial Files, Folder: Conservation HFC.

[71] Chief of Visitor Services and Chief of Museum Services, *Resource Management Plan*, pp. 38, 53, 55.

[72] Memorandum, Stephen Spaulding to Chief, Division of CRM, NAR, April 12, 1993; CRM Division Records, Northeast Region, Regional Curator's Files, Folder: SAHI: Operations/Evaluations.

[73] *1994 request*: referred to in FY 96 application for CRPP and MCPP funding; SAHI: Central Files, H20). *1996 request*: Project Directive: One Year Program, attached to Memorandum, Martinez to Superintendent, New England System Support Office, September 4, 1996; SAHI: Central Files, D 2621.

[74] Quoted in Wallace, *Historic Furnishings Report*, Harpers Ferry Center, 1989, Vol. 1, p. 30.

[75] Jonassen, "Re-evaluation of the Climate Control System," Fall 1981; SAHI: CRBIB, Box No. 5.

[76] Willy R. Stein, recorded interview, December 7, 2004 (recording at Sagamore Hill).

simply inadequate to raise interior conditions to an acceptable level. As for assuring steady heat and humidity, the system was simply incapable of it. The weak link was the ductwork, much of which was original to the house. The entire third floor had only two air vents. Moreover, the system contained neither returns nor an exterior air intake so that, unlike modern systems, the air could not be distributed, returned, conditioned, and recycled in an orderly way. Essentially, the system worked by pushing as much air as it could into the rooms – over-pressurizing them, in effect – and hoping that some of it would find its way into the house's odd corners. By the end of 1990s, Stein believes, the system was performing as well as it could: any further improvement would require new ductwork.

Curator Verone has a slightly different explanation.[77] She explains that, by the mid-1980s, engineers and architects realized that the problem of maintaining equable conditions in old houses was more complex than it seemed. The question was not only whether air of the correct temperature and humidity could be produced, but also whether the house's uninsulated walls could contain it. Efforts to upgrade other historic structures, she points out, had led to unforeseen problems. In Illinois, the Lincoln Home was retrofitted with waterproof insulation, but within a year site managers discovered that the consequent build-up of moisture between the walls was actually hastening the building's deterioration.

Today, notes Verone, park staff follow the effects of innovative treatments at other NPS sites, hoping for a solution. Meanwhile, they monitor the house's heating and humidification equipment in an effort to reduce seasonal shifts as far as possible. The problem continues.

NEW INITIATIVES IN COLLECTIONS MANAGEMENT

By about 1980, park managers were beginning to focus on restoring and displaying, as well as protecting, the Theodore Roosevelt House's interiors. Curator Gary Roth spearheaded a major restoration and refurnishing of the library, entrance hall, and dining room beginning in 1981. And park managers began to focus on the last major component of the house's mechanical systems, its lighting. These initiatives are described in Chapter 6 in connection with the much larger refurnishing project that culminated in 1993. But the most significant new undertaking of the 1980s at Sagamore Hill concerned its exceptionally large and varied collections.

[77] Amy Verone, e-mail to the author, February 2004.

While it is true that problems of conservation and storage had been noted as early as 1962,[78] there is no evidence that serious attention was paid to Sagamore Hill's collections before about 1980. When the National Park Service took over the park in 1963, it is likely that collections management struck agency officials as one area that was in relatively good shape. With the park itself had come the Theodore Roosevelt Association's long-time curator, Jessica Kraft. Agency officials thought highly of her, and unlike the house's physical fabric, which needed immediate attention, the collections appeared be in generally good condition and in good hands. Some conservation work was done around 1980, in connection with the interior restorations underway,[79] but the major impetus came from initiatives outside the park.

Before about 1980, collections management was not a major focus of the Park Service. That was now changing. During the 1980s, a series of external programs and mandates began to bring resources to bear on curatorial issues. Some came from Washington, D.C. In 1980 the agency created the position of Chief Curator, and in 1984 the Curatorial Services Branch in Washington revised the 1967 *Museum Handbook* and issued new service-wide cataloging standards. In 1987 came a more dramatic intervention. *Washington Post* columnist Jack Anderson had written a series of articles exposing the poor state of collections throughout the system. Congress responded by creating a dedicated fund for preserving and protecting collections, and for attacking the backlog of objects that had come into the agency's care without being properly cataloged. Other initiatives came from the North Atlantic Region. In 1981, the Division of Cultural Resources launched an Archeological Collections Management Program: the goal was to catalog and organize collections throughout the region according to service-wide standards. And in 1985, the division launched a Collections Accountability Project, designed to assess the status of historical, archeological, and archival collections within the region; to determine whether they met the revised cataloging standards; to catalog everything up to the registration level; and ultimately to implement full cataloging.[80] The program became a channel for agency-wide backlog cataloguing funds. Finally, in 1990, after Congress established a second fund for collections – the Museum Collection Preservation Program – the region's Collections Accountability Project was transformed

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[78] "For one reason or another, the conservation of the house furnishings has lagged....While few major repairs are necessary now, a year's lapse could add appreciably to the cost." Books were the biggest concern (Memorandum, Museum Curator Horace Willcox to Murray H. Nelligan, J. Carlisle Crouch, and Ronald Lee, August 1, 1062; NARA - Philadelphia, Entry 414B, Box 43, Folder: General Conservation, 1952-1966.

[79] See 10-238 form for historic structure report, December, 1982; Federal Record Center, Waltham, MA, Acc 79-83 0003, Box 4, Folder: D18 - SAHI-1984.

[80] Steven James Ourada (Regional Archivist, NAR), "Archives and Manuscript Materials in Parks of the North Atlantic Region," 1992; SAHI: Curatorial Files.

into the North Atlantic Region Branch of Museum Services (which later became the Northeast Museum Services Center).

That the region embraced the emphasis on collections was not surprising, since it boasted "the largest and most significant aggregation of museum collections in the Park Service, with approximately 10 million items...." And "at most sites in the region," collections were "either an integral part of the primary resource or are themselves the primary and most significant resource."[81] This was certainly true at Sagamore Hill. It was the house *and its contents* that Interior Secretary Udall had praised as the finest physical reminder of Roosevelt. It was amidst the "trophies, books, paintings, flags, and furniture" of the North Room that the *Area Investigation Report* had found the "spirit of Theodore Roosevelt" most vividly present. It was the collections that the *Master Plan* identified as the park's central resource. Sagamore Hill stood to benefit from the renewed emphasis on collections as well as the newly available funding.

The region's strong emphasis on collections management was soon reflected in planning documents and projects carried out by both park and regional staff. In 1983, the Museum Services Branch carried out a room-by-room inventory of objects throughout the entire house. In 1985, the Harpers Ferry Center replaced all of the room labels and engaged Curator David Wallace to prepare a historic furnishings report and plan. In 1986, park curator Christopher Merritt prepared a *Scope of Collection Statement*. The 1988 *Operations Evaluation* team placed strong emphasis on collections. In 1989, both the *Scope of Collections Statement* and the *Historic Furnishings Report* gained agency approval. The stage was set for major changes that would take place during the following decade and are discussed in Chapter 6.

In the meantime, however, the initial effect of region-wide initiatives at Sagamore Hill was to create an imbalance. Though its archeological collection was without question the least important of its holdings, it was singled out for early attention. In 1985, the Archeological Collections Management Program carried out a region-wide assessment to determine the number of collections that would need processing. Sagamore Hill's fell into the category of "small and not well documented" collections, and so in 1988, the archeological artifacts were taken to Boston for processing.

Sagamore Hill's archeological artifacts – 207 objects including "ceramic shards, intact glass bottles and drinking vessels, apparel related items…, household and personal objects....and some hand tools and hardware items" – entered the park's collection between 1983 and 1987. Most were retrieved during excavation for water and electric lines in 1983 and 1985-86. Others had been illegally removed from trash pits near Gray Cottage by a group described by police as "a male lawyer, a 20 yr female companion and

[81] Branch of Museum Services, Division of Cultural Resources Management (DCRM), NARO, "North Atlantic Region Collections Program: Long-Term Objectives and Initiatives," 1992, p. 3; SAHI: Central Files, H 20.

a 16 yr male companion." The lawyer's brother was also a lawyer, and upon hearing that the group was wanted for theft, he arranged to have the stolen artifacts returned.[82] Thus four boxes of antique bottles entered Sagamore Hill's archeological collection, and three malefactors avoided prosecution. The dumps were then planted with briars and poison ivy to discourage further molestation. The final report on the collections concluded that their unscientific excavation had "severely limited" their research value. Their principal significance was in helping to predict the locations of similar caches.[83]

By 1992, all of Sagamore Hill's archeological objects had been catalogued. Meanwhile, 7,200 of the park's important historical collection of 18,000 objects – or 40 per cent – still awaited cataloging. These included furnishings, artworks, and ethnographic artifacts, nearly all directly connected to Roosevelt. Likewise, 53,500 of the park's 56,000 archival records and photographs, including Roosevelt family documents and TRA records, remained in the cataloging backlog. During the 1990s, major progress would be made in these and in other areas of curatorial initiative introduced during the 1980s: the account continues in Chapter 6.

INTERPRETING SAGAMORE HILL

By the end of the 1960s, Sagamore Hill's interpretive machinery was largely in place, and it would not change much until the installation of new exhibits at Old Orchard in 2004. The 1980 Statement for Management provides a snapshot of visitation patterns during this period. Since 1963, visitation had increased substantially, and the park was now receiving "heavy use" in all months of the year except January. The nature of this use changed throughout the year. From September to June, the park was "inundated nearly daily" with school children. In spring, they began to give way to groups of senior citizens. Between April and June, reservations for group visits had to be made as much as six months in advance. During the summer, the typical visitor was a casual tourist or a member of a group from a day camp. From April to October, Sunday was the busiest day, with anywhere from 1,500 to 2,000 visitors. Afternoons saw cars spilling into overflow parking areas and visitors waiting on line for admission. The Theodore Roosevelt Home's occupancy limit of 125 was often reached, and it seemed too high.[84]

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[82] Record of Telephone Conversation, Detective Raymond McKeough of U.S. Park Police/Gateway and Captain Mike Healy, NARO, May 21, 1985; Federal Record Center, Waltham, MA, Acc. 79 93 0002, Box 2, Folder: A 7633 - SAHI.

[83] Louise M. DeCesare, *Archeological Collections Management at Sagamore Hill National Historic Site, New York. ACMP Series No. 7* (U.S. DOI, NPS, NARO, DCRM, 1990): quotations from pp. 17 and 7; SAHI: CRBIB, Box No. 13. See also Chief of Visitor Services and Chief of Museum Services, *Resource Management Plan*, p. 66.

[84] *Statement for Management*, p. 8.

Other details can be gleaned. In 1985, groups of fewer than 60 people that did not need any personal services from park staff received free admission. The park encouraged teachers to participate in special Educators Workshops on site before they brought their classes, and they could buy teacher's handbooks and audiovisual materials from the park. The park offered a range of programs oriented to school groups: for example, "Biography," "Victorian Basket," "T Bear," "Naturalist," and "Theodore Roosevelt Home Tour" were all offered to third graders.[85]

During this period, the pressure of increased visitation remained a constant concern. It focused on groups. In 1981, nearly 25,000 students and senior citizens visited in groups; the following year saw 26,000. In 1988, there were 301 school groups and 160 adult tours.[86] They challenged the service's ability to protect the house as well as to offer a satisfying experience to visitors.

The experience offered to visitors did not change much during this period. Most continued to experience the park primarily through "guided and self-guided tours."[87] While the Theodore Roosevelt House continued to be the main attraction, the park also used Old Orchard Museum both to orient visitors and to hold their attention. The park continued to rely on a combination of exhibits and audiovisual programs there. In 1976, television sets at Old Orchard showed short videos provided by the Theodore Roosevelt Association, as well as a documentary on Roosevelt produced by CBS in 1958.[88] In 1983, 12,000 visitors were counted at 760 separate audiovisual presentations,[89] and in 1988, Harpers Ferry Center was at work on two new videos to be used as "primary park orientation films."[90]

One interpretive tool that Sagamore Hill lacked was a good bookstore: one that could extend the interpretation offered on-site by putting a selection of books about Roosevelt and his times into the hands of visitors. Sagamore Hill's concession operation was not that bookstore. Its stock tended more towards souvenirs. And by the end of this period, if John Gable's impression was correct, the situation had seen a "marked deterioration." He would have liked to see a bookstore that stocked all books in print by

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[85] Correspondence between Superintendent Schmidt and Regional Director Herbert Cables regarding school visits, 1985; Federal Record Center, Waltham, MA, Acc. 79 93 0002, Box 1, File A-3615 - SAHI.

[86] Annual Report, 1988; Harpers Ferry Center.

[87] *Operations Evaluation,* November 1988.

[88] TRA Executive Committee minutes, April 24, 1976.

[89] Annual Report, 1983.

[90] *Operations Evaluation,* November 1988; SAHI: CRBIB, Box No. 3).

or about Theodore Roosevelt. The reality fell far short of that ideal: the stock of titles was so limited as to be "a matter of embarrassment."[91]

Other interpretive tools were showing their age. The park continued to offer visitors the guide leaflet from 1964, plus a companion for Old Orchard Museum.[92] Serious visitors could still buy Hagedorn's classic TRA-era *Guidebook*, republished in 1977 in a new edition revised by Curator Gary Roth. Much of the audiovisual material shown at Old Orchard dated from the 1950s. The park also continued to offer visitors Ethel Roosevelt Derby's 45-minute Acoustiguide tour, recorded in 1962; in 1985, more than 1,000 visitors rented it from the concessionaire. And then there were the exhibits at Old Orchard, installed in 1966, with one room devoted to Roosevelt's public career, another to Sagamore Hill and family activities, and a third to Roosevelt's children.

Superintendent Schmidt and her successor, Diane Dayson, both recognized that the park's interpretive machinery was aging. In discussions held around 1987 with the region's Chief of Interpretation, park staff urged the desirability of combining the two old brochures into a single new one in the now-standard "uni-grid" format. And in 1988, park staff expected the Harpers Ferry Center to begin work on developing new exhibits, with production scheduled for fiscal year 1989.[93] However, the new "uni-grid" brochure would not arrive until 1997, new exhibits not until 2004.

The Story Evolves

Like the apparatus used to present it, the interpretation itself changed little through the 1980s. The narrative continued to be organized around three themes: "Life of Theodore Roosevelt, his philosophies and accomplishments," "Sagamore Hill as Theodore Roosevelt's home, family and family life and as summer White House (1901-09)," and "Early 20th century life and environment."[94] Though the last of these seems to point to a new interest in social history, this does not seems to have been born out in the park's interpretive programs or printed material, which continued to present a reverential portrait of Roosevelt, humanized by anecdotes about family and domestic life. Collections policies, codified in 1986 in a *Scope of Collection Statement*, affirmed that Sagamore Hill's central goal was to "illuminate the life and personality of Theodore

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[91] Letter, Gable to Regional Director Marie Rust, November 20, 1992; SAHI Archive, Folder A42 - Cooperative Associations, Theodore Roosevelt Association.

[92] Copies, undated, are preserved at Northeast Regional Office, Boston, Planning Program Files.

[93] *Operations Evaluation,* November 1988.

[94] *Operations Evaluation,* November 1988.

Roosevelt as a great American leader" through collections focused on Roosevelt himself and amplified with "family objects and related political memorabilia."[95]

Yet however subtly, the story was changing – at least as presented by one important piece of the interpretive machinery, Curator Roth's 1977 guidebook. This was a re-edition of Hagedorn's 1953 classic. A comparison of two passages drawn from the description of the Library suggests a new sensibility (Fig. 28). While the theme of the opening is essentially unchanged – a busy man humanized by his warmth towards family – Roth has shifted the emphasis from the political to the familial. Hagedorn had likened the library to the Oval Office in the White House, but Roth drops the reference, with its strong overtones of both politics and statecraft. In Roth's version, the room becomes little more than a family gathering place, while Roosevelt's work becomes generic in nature (writing letters, holding meetings). At the same time, the anecdotal content becomes curiously bloodless: in Hagedorn's account, the children "want to snuggle next to him"; in Roth's, the president "appreciated their devotion." The concluding paragraph similarly reveals Roth's reluctance to engage with the specifically political content of Roosevelt's work. Here, Roth replaces a political with a personal anecdote. Gone are the concrete realities of politics and statecraft that mark Hagedorn's account. Never a strong theme at Sagamore Hill, politics and world affairs were giving way, at least in the park's official guide, to a greater absorption in the imagery of family.

Roth's guidebook continued the trends of the 1960s – the fading away of the earlier generation's personal engagement with Roosevelt, the detachment of family from political life, the diminished interest in world affairs. But Roth's guidebook also revealed an important new area of emphasis. The Park Service had told the Theodore Roosevelt Association that it had to revise the old guidebook because (among other things) it did not say enough about the house's furnishings.[96] Roth's description of the library suggests what the agency had in mind. Where Hagedorn had devoted a mere 24 lines of text to the library's furnishings, artwork, and mementos, Roth gave them 40 lines. Where Hagedorn mentioned nine objects, Roth described 16.[97] The change was revealing. Though he had been many things, Hagedorn had never been a museum curator. By 1977, Sagamore Hill had passed into the care of professionally trained curators, and in addition to conserving and studying the house's artifacts, they were also reshaping its story. Visitors were still invited to admire Roosevelt and love his family, but now the

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[95] Christopher J. Merritt, "Scope of Collection Statement – SAHI," February 1986; SAHI: CRBIB, Box No. 11.

[96] TRA Executive Committee minutes, February 21, 1976.

[97] Hermann Hagedorn, *A Guide to Sagamore Hill: The Place, the People, the Life, the Meaning* (New York: TRA, 1953), pp. 53-54; Hagedorn and Gary G. Roth, *Sagamore Hill: An Historical Guide* (Oyster Bay, NY: TRA, 1977), pp. 38-40.

Hagedorn and Roth describe Sagamore Hill's library	
HAGEDORN, 1953	**ROTH, 1977**
"This room was really Mr. Roosevelt's study, his private office and inner sanctum, and it probably saw the beginnings of more historical happenings during Mr. Roosevelt's administration than any other place except the Oval Room in the White House. Here the President dictated his correspondence, received visitors, and held important conferences. On the sofa, in the days of his governorship, one of his boys or girls was sure to want to snuggle next to him while he was dictating. Their questions at critical moments in his dictation were not always conducive to consecutive thought, but he appreciated their devotion so much that he could not bear to hurt their feelings by shooing them away."	"This room was Theodore Roosevelt's private office and study. Here he dictated his correspondence, received visitors and held important conferences. Yet this room was also a family gathering place where the children were welcome. Their interruptions at critical moments in the President's work were not always conducive to consecutive thought, but Roosevelt appreciated their devotion so much that he could not bear to hurt their feelings by shooing them away."
"You are tempted to linger in the library. Here the President worked. Here he fought for the ideas and ideals, the projects and policies, he believed in. Here, one evening in 1905, he listened to his friend Dr. 'Alec' Lambert tell him that he, the President, must back up Colonel William C. Gorgas and his ideas on mosquito-control at Panama, or lose the chance of building the Canal; and here he made his decision – and got the Canal. In this room at intervals he gathered his "women-folk" and the grandchildren about him during the war years; here, at the desk by the window, he sat evening after evening during the final eighteen months of the War, writing his four sons in France. In this room, too, he gave his answer to two political leaders, one from the East, the other from the West, when they asked him, in the summer of 1918, whether he were going to run for President in 1920: 'Yes, if the people want me. But I will not lift a finger for the nomination. It will have to come to me on a silver platter.' The answer still echoes in the room: 'Colonel, it will be yours, without strings, and on your own terms.'"	"One is tempted to linger in the library. Here the President worked. Here he fought for the ideas and ideals, the projects and policies, in which he believed. Here one evening in 1905, he listened to his friend Dr. 'Alec' Lambert tell him that he, the President, must back up Colonel William C. Gorgas and his ideas on mosquito-control at Panama or lose the chance of building the canal; and here he made his decision – and got the canal. In this room at intervals he gathered the home-bound members of his family about him during the difficult years of World War I, and here, at the desk by the window, he sat evening after evening during the war's final months, writing his four sons in France. 'I can't begin to say how proud we are of you,' TR wrote Archie. 'Our pride even outweighs our anxiety. You and your brothers, by what you have done during the last year, have more than justified our lives.'"

Fig. 28. A comparison of two passages from Hagedorn's 1953 guidebook and Roth's 1977 re-edition of it. (Quoted from Hermann Hagedorn , *A Guide to Sagamore Hill,* pp. 52, 54-55, and Hermann Hagedorn and Gary C. Roth, *Sagamore Hill*, pp. 36-37, 40.)

curators also asked them to respect his *objects*. Curators quite naturally accord a higher significance to objects than do most people, and Roth's guidebook invited visitors to enter Roosevelt's world as re-imagined by a curator.

A decade after the revised guidebook, park interpreters added another thread to the Sagamore Hill story – and a significant new tool to their kit. Roth's guidebook had said no more than its predecessor about the landscape – which is to say virtually nothing – but in 1986-87, Harpers Ferry Center delivered 17 new wayside exhibits to be installed around the park. Two orientation panels were set up next to the parking lot. The rest, low-profile etched aluminum panels ranging from 15 by 12 inches to 36 by 24 inches in size, were distributed through the core of the historic grounds. There were panels by the reconstructed windmill and the recently restored carriage house and chicken house. Panels were put up in the pet cemetery, and on the site of the old Stable and Lodge. Another described the Roosevelts' garden. These wayside exhibits filled in an aspect of Sagamore Hill's story that neither the old brochure nor the Hagedorn/Roth guidebook had covered: the landscape and its appearance in Roosevelt's day. While earlier interpretive plans had imagined that visitors might explore the grounds, the wayside markers represented the first organized attempt to guide them through it since completion of the nature trail in 1968.

It is likely that the waysides reflect park managers' practical worries about the Theodore Roosevelt House more than any strong interest in the park's historic landscape. The house faced worrisome pressure from crowds. Though no surviving document records this train of thought, it seems likely that park managers saw that, by interpreting the landscape, they could create an alternative attraction to the house itself. Many groups, in any case, never entered the house, either because tours were overbooked, they had been there before, or they were visiting outside opening hours; for them, as a later exhibit plan comments, the waysides became the "chief source of information about the site."[98] Still, a genuine interest in the landscape for its own sake was growing.

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[98] Michelle Jacques, "Sagamore Hill National Historic Site: Wayside Exhibit Plan" (Harpers Ferry Center, Division of Wayside Exhibits, November 8, 1995), p. [1]; SAHI: Central Files, Folder: D62. The author of this later plan for additional wayside markers stated (p. [9]) that "No written plan appears to have survived for the aluminum panels currently in the park," i.e. those installed in 1986-87. A small amount of additional information is contained in *Operations Evaluation*.

THE SHAPE OF THE LANDSCAPE

Nowhere was Sagamore Hill's planning deficit more keenly felt during the 1970s and 1980s than in the realm of landscape, for nowhere else had the failure of the master plan process left such deep uncertainty. Worse, by the time Superintendent Beasley arrived at Sagamore Hill in 1976, shifts in agency policy had pulled the props out from under the *Master Plan*'s central landscape recommendations, the reconstructed Stable and Lodge and the new visitor center. The conclusion reached the following year in the park's 1977 "Outline of Planning Requirements" – that neither element was "in harmony with current National Park Service policy" – left Sagamore Hill essentially without guidance on the development of its landscape.

The late 1970s appear to mark the low point in terms of interest in the park's landscape. The *Historic Resources Management Plan* of 1975 notes an ongoing program to clear underbrush in an effort to "restore the area back to the historic period,"[99] but otherwise devotes little attention to the landscape. The same is true of the 1980 *Statement for Management*. As for public interpretation, Curator Gary Roth's 1977 guidebook was virtually silent on the subject. The landscape had become a blank spot on the mental maps of visitors and park planners alike. A desire to fill in that gap became increasingly evident during the 1980s. Calling for a historic resources study of "period vegetation," the *Resource Management Plan* of 1982 urged attention to the "historic grounds" as the next logical step towards "upgrading the cultural resource" following restoration of the Theodore Roosevelt House interiors. A funding request was prepared the following year.[100] The park gave this a No. 2 priority rating, and it was not immediately granted. But the new wayside exhibits would arrive in 1987, and in the same year, Superintendent Diane Dayson identified landscape restoration as a central component of the hoped-for new master plan.[101] Interest in the landscape was clearly growing and would lead, in the following decade, to a major new planning document, a cultural landscape report.

In the meantime, park managers continued to work without a clear development plan for the landscape. Throughout this period, the pattern of decision-making suggests ambivalence in the truest sense of the word: some decisions were consistent with the goal of landscape reconstruction, others inconsistent with it.

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[99] Brown, DeMarce, and Steele, *Historic Resources Management Plan,* p. 24.

[100] 10-238 form for Historic Grounds Report, December, 1983; Federal Record Center, Waltham, MA, Acc 79-93 0003, Box 4, Folder D-18, SAHI 1984.

[101] "General Management Plan Scoping Meeting," September 9, 1987; Northeast Regional Office, Boston (NERO), Planning Program Files.

In general, a distinction must be drawn between the landscape itself and the architectural features upon it – the outbuildings, fences, and so forth. Decisions directly involving the latter tended to be consistent with the general goal of landscape restoration. This can be largely attributed to external mandates. New federal preservation requirements ensured that the historical value of architectural features would at least be minimally recognized. Passed in 1966, the National Historic Preservation Act called on federal agencies to nominate eligible buildings to the newly created National Register of Historic Places, and to submit subsequent modifications for review. In 1967-68, the National Park Service held a series of internal conferences around the country to consider the impact of the new rules.[102] Then, in 1969, the National Environmental Policy Act imposed a similar set of review requirements regarding proposals to modify the environment or landscape. At Sagamore Hill, the new procedures began to affect park management by the early 1970s. Although park and regional staff had already evaluated the park's historic structures for the *Area Investigation Report*, the *Master Plan*, and various historic structure reports, the National Register required a more formal evaluation. Now structures had to be declared historic or nonhistoric; there was no middle ground, and the distinction carried important legal consequences.

Nomination forms prepared by the regional office in the 1970s trace changing conceptions of historical significance, as well as growing understanding of the law. A draft prepared by the New York office in 1973 listed the Theodore Roosevelt House, Gray Cottage, Old Orchard, and most of the surviving farm structures as historic features. A revised form prepared by the North Atlantic Region in 1978 (and subsequently approved) captured more of the estate's surviving features: the foundations of the Stable and Lodge, post-and-rail fences, stones at the entrance and in the pet cemetery, Quentin's grave marker, overgrown retaining walls by the estate's original entrance, and the reconstructed windmill. At the same time, it formally categorized Old Orchard as nonhistoric (together with the TRA concession building, the 1968 information kiosk, the maintenance building, and the foreman's cottage).[103] Old Orchard's reclassification as a nonhistoric element did not necessarily signal a policy shift: to meet the National Register's criteria for historic status, a building had to be 50 or more years old, unless it was of exceptional importance. Since Old Orchard would not meet this technical qualification for another decade, the 1978 form merely corrected an earlier error. Old Orchard would be subjected to a more searching reevaluation in 1996.

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[102] Documents in NARA - Philadelphia, Mid-Atlantic Regional Office, Correspondence 1953-69, #079-75A-0102, Box 4, Folder: H30.

[103] National Register nomination forms prepared by the Wall Street Office, January, 1973, and the NARO, October 1978. The 1978 nomination was approved by memorandum in 1980.; NERO, History Program Files: National Register File.

But in the meantime, the net effect of the National Register's requirements in the 1970s was simply to confirm that the surviving built features of Sagamore Hill's landscape were of historic value, and to place them under the protection of the law.

During the 1980s, the regional office began to place increasing emphasis on the restoration of historic buildings, and this soon became evident at Sagamore Hill. In 1984, the Ice House was restored. In 1985-86, the Chicken House, Carriage House, and Tool/Implement Shed were repaired and rehabilitated at a total cost of $38,719. The work involved structural stabilization as well as substantial reconstruction and replacement of wood framing, siding, and roofing.[104] These actions ensured that architectural features essential to a restored or reconstructed historic landscape would survive, though they did nothing to bring about such a landscape, nor did their influence extend beyond the immediate vicinity of the Theodore Roosevelt House.

Meanwhile, in contrast to the outbuildings, the landscape itself was garnering little interest. There had been an initial burst of attention in 1963-64, as the NPS moved quickly to master its new stewardship responsibilities. Beyond cutting grass and pruning trees, there was a need to establish a comprehensive maintenance program,[105] and in 1964, at Management Assistant John Townsley's request,[106] horticulturist Bruce Arnzen provided detailed treatment recommendations covering subjects ranging from pruning the apple trees by Old Orchard to removing thatch from the lawns. Arnzen's regimen showed some awareness of historically appropriate plant materials, as well as native plants. But it made no reference to future restoration of the park's historic layout: it was simply a guide to maintaining what was there.[107]

By the mid-1970s, the existing landscape appears to have deteriorated in significant ways from that of Roosevelt's time – though how much, if any, of that decline took place after 1964 is hard to say. Maintenance Mechanic Willy Stein first saw Sagamore Hill about 1976. He recalls that, when he first drove up to the house, it was largely obscured by trees, hanging vines, and undergrowth. Maintenance workers had named the north lawn – once kept open for its sweeping views of Long Island Sound – the "land of many trees." By 1977, he recalls, park managers were beginning to "push

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[104] Paul Sazani and Richard C. Crisson, *Completion Report: Rehabilitation and Stabilization of Three Outbuildings (Chicken House, Carriage House, and Tool Shed), Sagamore Hill National Historic Site* (Boston, MA: U.S. DOI, NPS, North Atlantic Historic Preservation Center, 1985-October 1986); SAHI: CRBIB, Box No. 10.

[105] Memorandum, Golub to Lee, February 24, 1964; NARA - Philadelphia, Entry 413, NPS NE Regional Office 1953-68, Administrative Correspondence D-22, Box 22, Folder: SAHI.

[106] Memorandum, Horticulturist Bruce R. Arnzen to Assistant Regional Director, Operations, June 2, 1964; NARA - Philadelphia, Box 9, Entry 414, 1953-64.

[107] Arnzen, "Recommendations for the Grounds of Old Orchard" and "Recommendations for Grounds at Sagamore Hill," attached to memorandum to Assistant Regional Director, Operations, June 2, 1964.

back" the overgrowth. Presumably this reflected the restoration initiative that had been described two years earlier in the park's *Historic Resources Management Plan*. But Stein's perception was that the work was motivated as much by fear of fire. By the mid-1980s, at any rate, the park had "backed off" maintaining the landscape, due in part to increasingly severe staff and budget cuts. The field between the Theodore Roosevelt Home and Old Orchard, which had been cleared, now reverted once again to forest, which also began to invade the remnants of the orchard itself. Clearing would not resume until the 1990s.[108]

Woodcrafter George Dziomba, who came to the park in 1978, essentially agrees with Stein's account, though with a slightly different emphasis. He recalls that the Chief of Maintenance at that time, Jack Maginnis, was intensely proud of the estate's appearance. He had worked for the TRA and, before that, for Mrs. Roosevelt. He spent many hours sharing his recollections of Roosevelt family days and his intimate knowledge of the estate with park staff. During the association years, according to Dziomba, park management had focused on maintaining the area immediately around the house and parking lot. "For what they did," he says, "they did really fantastic work." Yet the TRA largely neglected the rest of the estate. After being "inherited by the Park Service," Maginnis took the opportunity to begin reclaiming it, putting his "heart and soul" into keeping the estate "pristine." Maginnis, however, became fatally ill with cancer. Moreover, Superintendent Schmidt disliked him; and so by the late 1980s the estate was once again in decline.[109]

Neglect was not the only enemy of the historic landscape. Like the visitor center proposed in the 1970 *Interpretive Prospectus*, development projects during these years were generally insensitive to the integrity of the historic landscape. The largest gardening initiative of this period was the creation, in 1989, of a rose garden in memory of Jessica Kraft, the park's first curator (Fig. 29). Supported by the TRA, the plan raised interesting policy questions. NPS officials agreed that, as a general rule, memorials were not constructed until 20 years had passed since a person's death. This would require an exception, since Mrs. Kraft had died quite recently. Regional officials therefore asked for assurance that Mrs. Kraft's association with the park was of such "transcendent importance" as to justify an exception – and to discourage the association from requesting further memorials.[110] These assurances were provided; the policy was bent. Little thought seems to have been given, however, to the memorial's placement, which was near the edge of the parking field and at the heart of the estate's historic core.

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[108] Willy R. Stein, recorded interview with author, December 7, 2004. The Resources Management Plan of 1975 notes an ongoing effort to cut brush.

[109] George Dziomba, recorded interview with the author, December 7, 2004.

[110] Memoranda, Dayson to Associate Regional Director, October 17, 1988, with attached layout plan; and Charles P. Clapper to Superintendent Dayson, November 14, 1988, and January 23, 1989; NMSC, Files of the Regional Curator, Folder: SAHI Memorial Rose Garden.

Perhaps it was assumed that the roses could be easily removed in the event of a future landscape restoration. In any case, by the 1990s the garden had become hard to maintain, particularly in an era of increasingly tight budgets: walkways became unkempt, bushes died.[111] Meanwhile, the park's *Cultural Landscape Report* was creating new interest in the historic landscape. The rose garden was being removed by Superintendent Lorenza Fong as this history was being written.

Fig. 29. Rose garden designed as a memorial to Jessica Kraft: view in 1993. (Reprinted from Bellavia and Curry, *Cultural Landscape Report for Sagamore Hill National Historic Site,* Vol. 1.)

The Concession Building

Other development projects were no more supportive of a restored landscape. The construction of a small information kiosk in 1968 (and its relocation in 1981 to the edge of the parking lot) suggested an acceptance, at least for the time being, of the park's existing layout. The kiosk was, to be sure, a very small structure: small enough to be considered disposable. The concession building represented a more serious obstacle to landscape restoration. Built by the Theodore Roosevelt Association in the 1950s, it was the closest thing Sagamore Hill had to a visitor center. "It is planned that this building

[111] Willy R. Stein, recorded interview with author, December 7, 2004.

will eventually be obliterated," comments a staff travel report of 1967.[112] But there it stayed. Until 1984, it contained a snack bar, open on weekends during the summer months and every day in July and August. It offered no place for uniformed staff to greet visitors or sell tickets: during 10 months of the year, this was done in the front hall of the house itself.

The concession contract was due to expire in 1980: there had been complaints about the concessionaire's service. In 1978, an environmental compliance review was carried out to assess the possibility of renewing the contract. Planners still believed it possible that the intrusive concession building might be removed during the term of the contract; in that case, the concession would have to go with it to a new location. They considered an alternative: terminating the concession contract but retaining the building for park use. This would allow the NPS to move fee collection out of the Theodore Roosevelt Home, and the public restrooms out of the historic icehouse, which could then be restored. The alternative was rejected: it appears to have been studied mainly as a compliance exercise. Regional planners believed the concession services were needed: the nearest restaurants and souvenir shop were 3 miles away in Oyster Bay, and besides, providing a patio for visitors to eat lunch would keep picnickers off the lawns and help control the problem of litter.[113] The contract was renewed, though only for three years.

Before it expired again, the agency's thinking had changed dramatically. The nearest restaurants and souvenirs were still located in Oyster Bay; but now their availability "within three miles" proved not that the concession was needed, but exactly the opposite: that it was *not* needed. Moreover, funding had been programmed to restore the Ice House in 1984, and a "definite need" had been discovered to have the public restrooms closer to the parking lot: federal law and agency policy required them to be handicapped-accessible. Other benefits of terminating the concession contract were discovered. "The ideal solution...," concluded the "Visitor Use Plan" prepared in August 1983, "seems to be the conversion of the gift shop into a visitor orientation/fee collection station."[114] Schematic plans were produced showing how ticket sales, information, and group orientation could be accommodated into the space relinquished

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[112] Memorandum, Mechanical Engineer, Division of Maintenance, to Regional Director, December 6, 1967; NARA - Philadelphia, Box 3, Entry 413, NPS NE Office General Correspondence 1966-68, Folder: SAHI Test Reports 1966-68.

[113] North Atlantic Region, "Assessment of Alternatives, Concession Operations, Sagamore Hill NHS " [n.d.]; Memorandum, Chief, Environmental Compliance, to Regional Director, August 25, 1978; Memorandum, Superintendent Roy Beasley Jr. to Regional Director, August 14, 1978; all NARO NEPA File.

[114] "Visitor Use Plan, Sagamore Hill National Historic Site," August 1983. The document appears to be a draft of the October 1983 plan, and is annotated. For handicapped-accessible requirements, see p. [1], which references the Barrier Free Act (Section 514) and NPS Directive No. 8343; NARO: Planning Program Files.

by the gift shop and food concession (Fig. 30). The proposal "would solve many of the existing problems" that had plagued park staff for two decades. There were further dividends. With food service gone, garbage would no longer need to be stored in dumpsters between the Carriage House and the Chicken House. The latter could be detached from the modern enclosures that connected it to the concession building and properly restored.[115]

The Chicken House and Ice House were restored. Public restrooms replaced the snack bar.[116] But the concession for retail sales remained in its accustomed place. With contract negotiations schedules to begin again in 1988, park and regional staff addressed the problem once more. Now it seemed as if the solution had receded. The existing concession building was too small for a visitor center; it could not be enlarged. Besides, it was "poorly built" and needed "complete rehabilitation"; two alternate locations for a combined new concession operation and visitor center had been identified.[117] These were difficult decisions, of precisely the sort that park managers and agency officials were particularly reluctant to make without the guidance of an approved general development or master plan – which was, of course, exactly what the park lacked. The dilemma posed by the concession contract led the regional office in 1985 to issue one more in the long series of calls for a new master plan. In the meantime, the immediate issue was resolved, but only, as it were, by kicking it down the field: the contract was renewed, and there would be no further consideration of the concession building's role in the landscape until the following decade.

Park Boundaries

One landscape challenge that cannot be traced to the collapse of the master plan process was the threat to the park's historically rural character that began to arise outside its borders during the 1980s. It is true that the failure to acquire the Emlen and John K. Roosevelt parcels along the park's southern boundary complicated the visitor center problem and helped block landscape restoration. But the threats of development pressure, when they arose, came not from the south but from the north.

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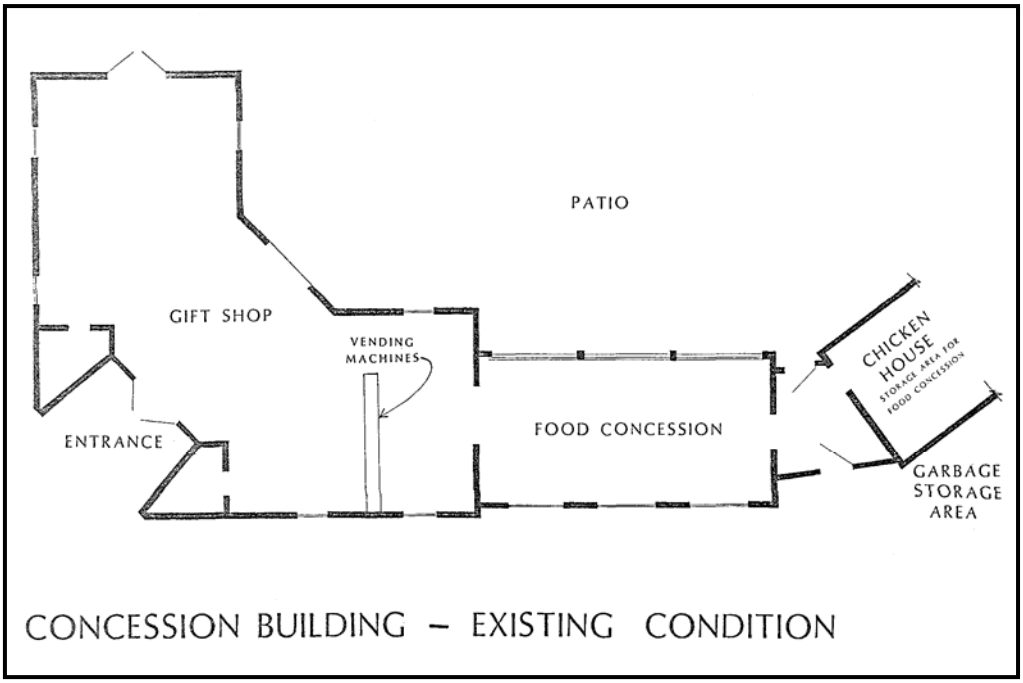
[115] These conclusions followed a period of some administrative confusion between Superintendent Loretta Schmidt and the regional office as to what was intended or funded. See letters, Schmidt to James I. Hill (Saga-Hill Corporation), May 25, 1983, and Memorandum, Regional Director to Schmidt, August 12, 1983; NARO: NEPA Files).

[116] Project documents for rehabilitation of Concession Building (bids to be accepted until September 17, 1984); SAHI: Central Files, Folder D18. The 1985 Annual Report notes award of a contract for $78,230 for the conversion to restrooms, including installation of an oil heating system; Harpers Ferry Center, SAHI Box: Misc.

[117] 10-238 form, September, 1984; Federal Record Center, Waltham, MA, Acc 79 93 0003, Box 4, File D18: SAHI 1984. The alternate locations are not specified.



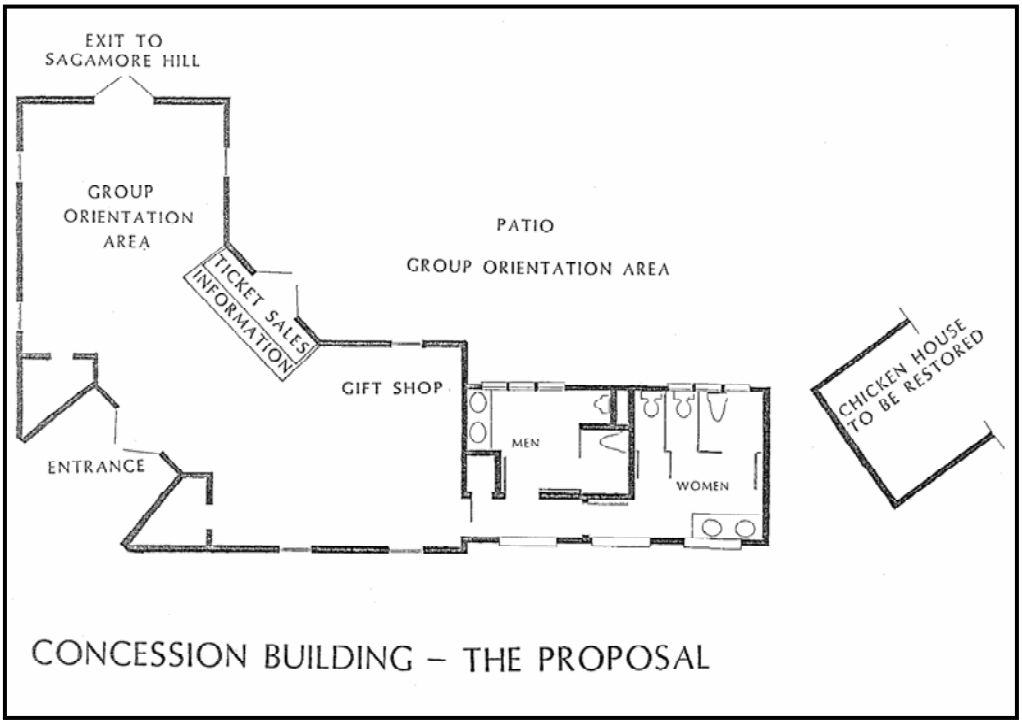


Fig. 30. The 1950s concession building: *top*, as existing in 1983, and *above*, as it would appear following proposed rehabilitation as a visitor contact station. (Reprinted from "Visitor Use Plan, Sagamore Hill National Historic Site," 1983.)

Many, perhaps most, parks are affected by what happens outside their boundaries. Drifting smoke from a distant power plant may impair the crystal clarity of the air and curtail distant views. Highway or industrial noise may intrude on visitors' sense of solitude. Development may gradually surround the park, isolating it from the larger natural environment. These and other external factors may detract from the park's ambience and create serious, sometimes insoluble, challenges for management.

For many years Sagamore Hill seemed immune from development pressures. The 1963 draft *Master Plan* called the condition of contiguous land "compatible" with the site's purpose,[118] and as late as 1980, a management statement reported that "there is no pressure for commercial development within the vicinity of the park," though some 4-acre-minimum subdivision could occur.[119] At Sagamore Hill, concerns focused more on protecting residents from the impact of the park than vice versa. Cove Neck was, and is, an area of expensive estates: the park's neighbors felt entitled to respectful treatment from their government, and that included being well insulated from the visiting public and from any kind of nuisance. In 1994, neighbor Barry Yampol asked the park not to use outdoor lights on Old Orchard because, as Superintendent Martinez paraphrased, they had a "negative impact on his property and the resident wildlife." Martinez received warnings that a lawsuit would probably follow if the park did not "concede to his wishes."[120] The park did not concede, but it was forced to put resources into studying the problem.

The sense of entitlement was deeply rooted in Cove Neck. Bertha Rose recalled that, when the TRA proposed to buy Sagamore Hill, many residents "felt that the intrusion of a public building violated their rights as residents." So strong was their opposition that she left one village meeting "without too much hope that Sagamore could be saved."[121] In fact, neighbors fought bitterly against the necessary road improvements. Much later, in the 1980s, residents formed a beach patrol to control the problem of intruders into Cove Neck. During the first eight months of 1992, the patrol ejected 88 people, including 15 from Charles Wang's estate, 11 from Eel Creek, and 48 from Sagamore Hill. Cove Neck property owners asked Sagamore Hill to help support

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[118] *Package Master Plan* (Sagamore Hill version), p. 2.

[119] *Statement for Management*, p. 6. The statement did suggest a land swap of .02 acres to protect vehicular access to the maintenance area and Old Orchard, which currently crossed another property.

[120] Memorandum, Martinez to Associate Regional Director, Park Operations, January 25, 1994; SAHI Archive, Folder A18-Advisory Boards, field groups).

[121] Mrs. Reginald P. Rose, "The Sagamore Story," in "Sagamore Hill" (brochure), NPS, n.d., p. 3; SAHI - Interpretation Files, Folder: Educational Materials.

the patrol, which it did.[122] The park attempted to be a good neighbor in other ways, such as contributing to the cost of extending the public water supply from Oyster Bay. And when an Avianca jet crashed in Cove Neck, Superintendent Diane Dayson was a leader in coordinating rescue efforts.

Development began to encroach on the park by the mid-1980s. John K. Roosevelt planned to develop cluster housing on a 62-acre parcel (No. 516 on the map), which stretched along the park's northern boundary. The Zollers, long-time neighbors to the northwest, were also thinking of developing about 50 acres of Parcel 515, which lay just west of the 11-acre parcel they had bought from the TRA in 1961. This plot, too, might be ripe for development.[123]

In 1984, Congress addressed these threats by appropriating $245,000 to purchase land,[124] and next year, the North Atlantic Region approved a "Land Protection Plan."[125] It identified three parcels along the northern boundary as critically important for protection of the site's original character, including its views (Fig. 31). The park would ask John K. Roosevelt to donate an easement over two of them, small segments of Parcel 516 (Tracts B and C on the map). Totaling 4.5 acres, they lay directly along the park's border and adjacent to the estate's historic core: they would provide a "narrow strip of trees" screening future development from the main visitor areas. The third, a wedge of just over 5 acres (Tract A), would have to be acquired outright. As for the section of the estate's northern arm sold by the Theodore Roosevelt Association in 1961 (Lot 514), planners concluded that the topography would hide any possible development without the need for additional land purchases.

In 1985, the Trust for Public Land acted on the National Park Service's behalf to purchase Tract A and turn it over to the park. That secured the park's northwest corner. Meanwhile, the threat of cluster development had receded from the northern boundary. But no written agreement had been reached regarding the easements over John K. Roosevelt's Tracts B and C, and now Parcel 516 presented new problems. Billionaire Charles Wang now owned it, and in 1986 his contractor was spotted using a chain saw to clear brush along Sagamore Hill's historic split-rail fence. Wang intended to enclose his estate behind a 6-foot-high cyclone chain fence. This alarmed Superintendent Schmidt, who saw it as "a major visual impact on the historic scene...." With no village codes or ordinances to defend the park, and no easement, she turned to the regional director for

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[122] Statistics from letter, Hank La Bella to Dan Leon (President, Coopers Bluff Association), September 1, 1992. Request for contribution: letter, Thomas Leon (Cove Neck Property Owners) to Superintendent Martinez, October 15, 1992; SAHI: Central Files, Folder A42).

[123] "Land Protection Plan" [draft], approved May 14, 1985. Available in NERO: Planning Program Files.

[124] Public Law 98-473, October 12, 1984.

[125] "Land Protection Plan."

help, while seeking to negotiate with Wang. She was able to ensure that the cyclone fence would not interfere with NPS access,[126] but by 1989 Wang had finished fortifying his estate, and the cyclone fence had grown to 8 feet in height. He had inserted a new driveway as well as other indications of an expensive estate, which were intruding on Sagamore Hill's historic ambience. The "undeveloped land" and "broad views to the Long Island Sound" that had surrounded Sagamore Hill in Theodore Roosevelt's time were giving way to what Park Service staff described as a "man-made 'Japanese Garden' setting."[127] In 1989 the "Land Protection Plan" was amended in response to this new situation (Fig. 32). Control of what was left of tracts B and C was now more important than ever, and the amended plan called for purchasing an easement, or even buying the property outright, if Wang would not donate it.[128] The situation remains unchanged today.

MANAGING WITHIN A TIGHT BUDGET: THE 1980S AND 90S

Before about 1980, surviving documents offer little evidence of anxiety at Sagamore Hill over funds to pay for basic operating needs. After 1980, budget pressures became chronic, and shortages of money or staff (essentially the same thing) regularly influenced management decisions in many areas. Maintenance, upkeep of the grounds, administration, and visitor services were particularly hard-hit, because these were the areas in which it was most difficult to supplement inadequate park budgets with outside funds. But anxiety about resources colored every aspect of park managers' thinking. Nor were regional officials exempt from worry. They felt the pressure from park staff, of course (and no doubt from many other parks as well). Moreover, many if not most of the funds at the region's disposal – funds that could be used to pay for special projects in areas like museum conservation, architectural preservation, or planning – were awarded on a competitive basis, and there was never enough money to pay for every worthwhile project. Even essential projects frequently had to be postponed. And so new exhibits, updated brochures, and planning documents were anticipated, announced, and then postponed – often more than once, and sometimes for many years. Meanwhile, superintendents struggled to plug the gaps with volunteer labor and private fundraising, efforts that brought their own demands and stresses. Chronic shortages of funds, together with all of the management consequences that flowed from them, became a

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[126] Memorandum, Superintendent to Regional Director, October 15, 1986; Federal Record Center, Waltham, MA, Acc 79-93 0003, Box 7, File H-3015, SAHI 10/86.

[127] "Addendum to Land Protection Plan for Sagamore Hill National Historic Site," March 1989; NERO, NPS Planning Department, Correspondence File.

[128] "Addendum to Land Protection Plan."

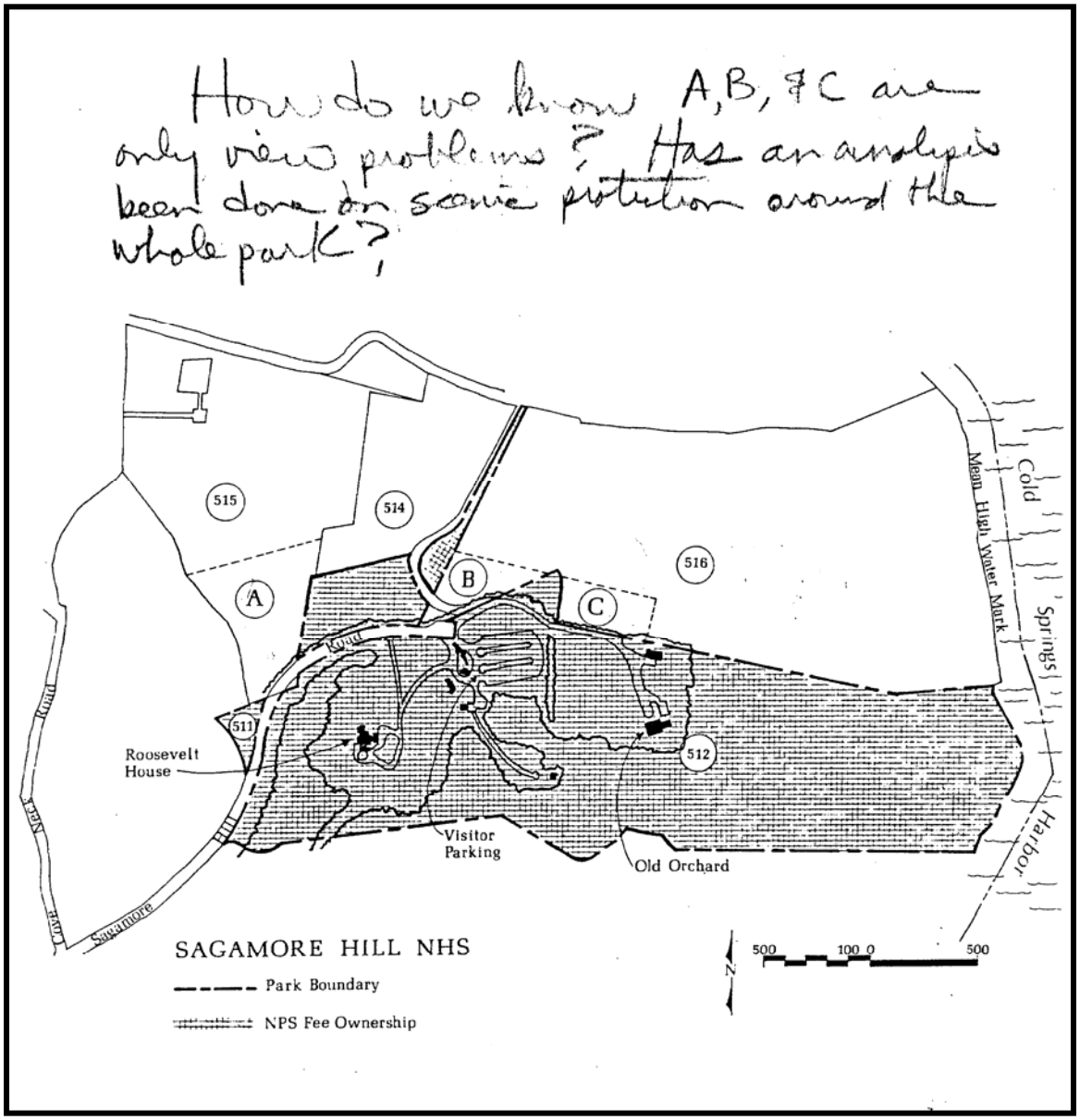

Fig. 31. An annotated copy of the draft 1984 Land Protection Plan indicates parcels A, B, and C desired for park purchase. (Reprinted from "Land Protection Plan" [1984 draft].)

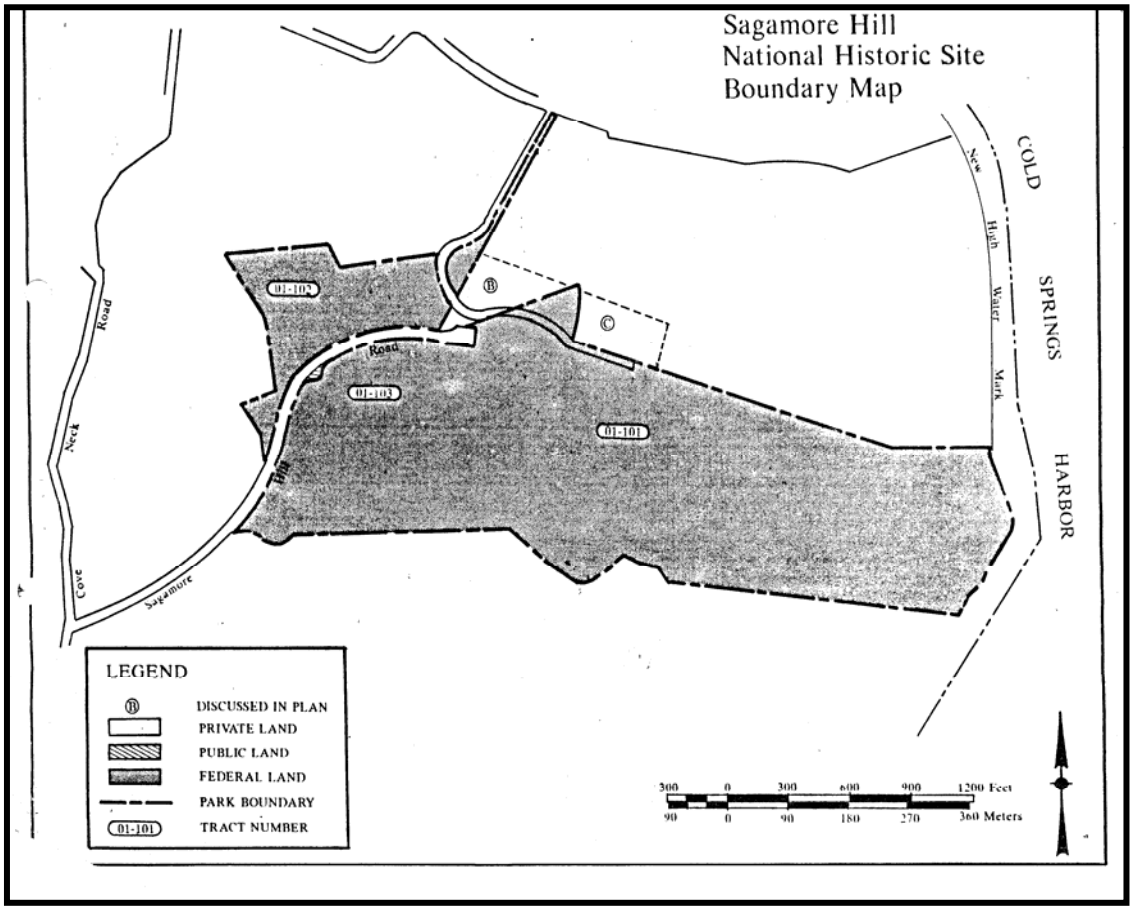

Fig. 32. The 1989 "Addendum to the Land Protection Plan" shows that Parcel A has been acquired and added to the park, while Parcels B and C remain unprotected. (Reprinted from "Addendum to Land Protection Plan for Sagamore Hill National Historic Site," 1989.)

basic feature of life at Sagamore Hill, one that influenced almost every aspect of the park's operations in some way.

The course of financial worries can be easily charted. In fiscal year 1981, Sagamore Hill's operating budget was $365,900. By fiscal year 1990, it had grown to $502,200. This looks like substantial growth, but adjusted for inflation, 1981's budget would have totaled $550,931 in 1990 dollars.[129] So the 1990 budget actually represented a decline of 8.8% over the previous decade. The reality was surely worse. The rise in costs facing the owner of a large piece of property – fuel, equipment, salaries and benefits – probably outpaced the national rate of inflation. And Sagamore Hill was located in an expensive part of the country. Besides, even a level budget would have pinched. Any nonprofit institution with an existing staff and physical resources must modestly but continuously increase its budget, even to maintain its services at the same level.[130] With its aging resources and rising visitation, Sagamore Hill was being pinched from both ends. As the park's 1983 report delicately put it, "The management of the site was offered numerous opportunities to test its ability to manage more efficiently."[131]

The pinches came regularly. In fiscal year 1982, budget cuts forced the park to close Old Orchard Museum on weekends in December and to terminate two 180-day interpreters before their terms were up.[132] In 1983, the park allowed two maintenance positions to remain vacant through most of the year in order to free up funds for major repairs to its maintenance equipment. With a smaller maintenance staff, the park used service contracts with local companies for basic repairs, while turning to volunteers to maintain the grounds and rehabilitate the environmental trail. Sagamore Hill also benefited from technical assistance from the Soil Conservation Service and the Appalachian Trail Commission, and it got the Forest Service to spray for gypsy moths.[133]

Shortages elsewhere in the system exacerbated Sagamore Hill's problems. In September 1983, the park's superintendent, chief of visitor services, and administrative officer all worked "on detail" for Manhattan Sites to fill voids left by eight vacancies

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[129] Inflation figures from EH.Net, the website of Economic History Services, a project supported by the Economic History Association, Business History Conference, Cliometric Society, Economic History Society, and History of Economics Society, at http://www.eh.net/ehresources/howmuch/inflationq.php (consulted in October 2004). The figures are national averages. They are calculated by calendar year, not according to the federal government's fiscal years. The figures used are for calendar years 1981 through 1989.

[130] This is explained in Jed I. Bergman, *Managing Change in the Nonprofit Sector: Lessons from the Evolution of Five Independent Research Libraries* (San Francisco, CA: Jossey-Bass Publishers, 1996).

[131] Annual Report, 1983; NARA II - College Park, FRC Boxes.

[132] Annual Report, 1981; NARA II - College Park, FRC Boxes.

[133] Annual Report, 1983.

there. Meanwhile, they continued to fulfill their regular assignments at Sagamore Hill. It was an "'interesting experience,' to say the least. . . ."[134]

At the end of 1985, President Reagan signed the Gramm-Rudman Bill into law. The bill set targets for reducing the federal deficit, and obliged the President and Congress to make mandatory reductions until they were met. The following summer, on a hot July 4, visiting children were forced to eat lunch on a bus, rather than picnicking outdoors. The episode provoked complaints that went up to Congress.[135] Superintendent Schmidt explained that Gramm-Rudman had forced the park to cut back on visitor services.

"The site is critically understaffed at present," concluded a group of park and regional staff two years later. "The impact of heavy visitor use with inadequate supervision is a critical problem."[136] This was not mere whining: the problem had become severe enough to merit discussion in the scoping meeting for the proposed new master plan. According to the 1988 *Operations Evaluation*, the pain of inadequate staffing was felt throughout Sagamore Hill's operations, and it was heightened by the difficulty of recruiting trained staff, given the shortage of housing and high cost of living in Sagamore Hill's expensive corner of Long Island. The evaluation found that inadequate staffing limited the outreach efforts of the Interpretive Division; forced the maintenance division to contract out more work than it should; and left the house wide-open to the theft of objects on display. The evaluation called this the most serious threat to the preservation of resources; indeed, it had effectively halted progress in the park's cultural resources management, apart from major conservation treatments funded by payments from the endowment. While there were three permanent positions in Interpretation, the evaluation found that an "absolute minimum of six interpreters" was required. In maintenance, it found a staff of two plus a supervisor – not enough to run the new Maintenance Management System reliably. And of course the real problem was not so much running the computer system as doing the actual work; an assessment carried out the following year documented deferred maintenance needs totaling $972,000.[137] In any case, the *Operations Evaluation* called for increases in every area: maintenance, visitor services, and curatorial staff.[138]

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[134] Annual Report, 1983.

[135] See, e.g., letter, Elizabeth C. O'Donnell (Meadowbrook School) to Senator D'Amato, July 4, 1986; Federal Record Center, Waltham, MA, Acc. 79 93 0002, Box 1, File A-3615 - SAHI.

[136] "General Management Plan Scoping Meeting," September 9, 1987. The participants included Superintendent Diane Dayson as well as the Chief Curator, Chief of Visitor Services, and Chief of Maintenance, plus staff from the regional office.

[137] DeLeuw Cather, *Sagamore Hill National Historic Site, Maintenance Management Implementation, Final Report*, June 1989; SAHI: Central Files, Folder: D 18.

[138] *Operations Evaluation,* see esp. Chapters V, VIII, IX, and IXa; SAHI: CRBIB, Box No. 3.

Budget problems had affected Loretta Schmidt's entire tenure as superintendent. When Diane Dayson arrived late in 1987, she hoped to expand the park's operating hours from six to seven days per week. But in 1989, budget cuts forced a reduction to five days.[139] By 1991, the park was open seven days per week, but once again faced funding shortages. The Theodore Roosevelt Association lobbied, Congressman Mrazek stepped in, and the park narrowly escaped having to cut its open hours.[140]

In 1995, a Congress dominated by conservative Republicans under the leadership of Newt Gingrich attempted to make sweeping cuts in federal spending. At a press conference in May, Secretary of the Interior Bruce Babbitt released a list of 200 small parks that might have to close if the proposed bill were passed. Sagamore Hill was among them, and by mid-summer the park had been "inundated with media coverage."[141] Babbitt's announcement had been intended to dramatize the fact that Congress's budget cuts were equivalent to the combined operating budgets of 200 parks. But many saw a direct threat to Sagamore Hill. If Babbitt had hoped to provoke expressions of support for the parks, his gambit worked. But it provoked other responses too. Calling Babbitt "Chicken Little," Republican Congressman Peter King assured the public that Congress was deeply dedicated to the parks, and to Sagamore Hill in particular. Behind the scenes, billionaire neighbor Charles Wang offered to buy the park and keep it open. With a fanfare of publicity, local executive Alan Davidson called on the Town of Oyster Bay to issue bonds and take over the park. "It's an exciting concept," said Mr. Davidson, "to take back things and run them better, locally!" Superintendent Martinez was kept busy reassuring the press that Sagamore Hill was not about to close. John Gable helped out, too. He told one reporter that Davidson's plan "doesn't merit further study and would be a waste of time." Commented Town Councilman Louis Savinetti, "If John Gable says it isn't necessary, it's dead."[142]

Sagamore Hill did not close. But that fall, Congressional Republicans forced a showdown with President Clinton, and on November 14, after the president refused to accept Congress's spending limits, the federal government shut down, and with it the parks. An estimated 800,000 federal workers were furloughed. In Arizona, Governor

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[139] Michele Titcher, "Sagging Funds for Sagamore Hill," *Newsweek*, Dec. 23, 1989; clipping in SAHI, Central Files, K 34.

[140] TRA Sagamore Hill Committee Minutes, February 21, 1991; SAHI: Central Files, Folder A42. About 1993-94, the park did decide to close for two days during the winter, rather than for one day throughout the year. Curator Amy Verone explains that this was a good solution for everyone: wintertime visitors are few, and the closings allow staff to carry out needed maintenance work efficiently and without inconveniencing them. Information e-mailed to author May 11, 2005.

[141] Memorandum, Martinez to Manager, CRC, July 26, 1995; SAHI: Central Files, Folder H30.

[142] Dagmar Fors Karppi, "Sagamore Hill Ills Were Exaggerated," *Oyster Bay Enterprise-Pilot*, July 20, 1995; clipping in SAHI: Central Files, Folder: H30. Davidson was president of Long Island-based Zeus Securities. Information on Wang offer provided by SAHI staff.

Fyfe Symington called on Clinton to bring in National Guardsmen to keep the Grand Canyon open, but other parks and park-goers suffered less dramatically. The shutdown ended five days later, but the impasse between Congress and the White House continued. On December 16, the government shut down again. This time the closure was only partial, but it included the parks. And it did not end until January 6, 1996. It had become the longest government shutdown in U.S. history. And while the immediate political issues were resolved, it dramatized the pressures that Sagamore Hill and other parks would continue to feel as political leaders attempted to limit federal spending.

Mandates

Congress, of course, had an enormous impact on park funding, not only by passing the service's annual budgets, but sometimes also by telling it how to do its work or spend its money. In 1984, the General Accounting Office (later renamed the Government Accountability Office) published a report, *The National Park Service Needs a Maintenance Management System*; Congress then passed a law mandating one.[143] The Maintenance Management System (MMS) was to involve all levels of staff involved in maintenance, and was to improve both quality and efficiency. In 1986 the Park Service retained a consultant to work out a system-wide plan, which Sagamore Hill started implementing in 1988.

Maintenance management, according to the consultants, starts with an inventory of assets and, where appropriate, an assessment of their condition. Sagamore Hill's assets were:

Total Road Miles	1.5
Total Trail Miles	1
Seasonal Housing Units	0
Permanent Housing Units	5
Total Buildings	12
Total Maintained Grounds Acres	20

Work was to be described in standard units, such as acres or feet. Person-hours were no longer an acceptable measure; unfortunately, as of 1989, 68% of Sagamore Hill's maintenance budget, or 25 of its 44 work activities, continued to be measured in person-hours. That would have to change.

Roger Johnson, who had implemented MMS at another NPS unit before coming to Sagamore Hill, views it primarily as a record-keeping system: better at storing

[143] Report, June 1984; PL 98-540, October 1984; see Cather, *Maintenance Management Implementation Final Report*.

information than helping park staff to make sense of it.[144] A computer was purchased specifically to run it, and Johnson believes it was the first at Sagamore Hill: he recalls that it was considered to be so valuable that it had to be placed in the administrative offices, where unfortunately it was little use to the maintenance division. Only later was it moved to the maintenance office. Unfortunately, according to Johnson, while it was relatively easy to put information into the system, it was more difficult to "back it out." While Maintenance Management may have provided central office managers and Congress with useful information on the agency's overall performance, it did not necessarily lead to on-the-ground improvements in managing maintenance work.

To the uninitiated, MMS – whatever its benefits – might seem to lack something else, a certain evaluative dimension. Buildings are not all equal at a park like Sagamore Hill, nor are acres: reroofing 100 square feet of the Theodore Roosevelt Home is not equivalent to reroofing 100 square feet of the concession building. Yet the system provided no good way to recognize such distinctions. Under MMS, a building was a building, a mile a mile, an acre an acre. In any case, says Johnson, the system was abandoned in 2000: the computer program was not Year-2000 (Y2K)-compliant and could not be fixed. It was replaced by a new system called Facilities Management Software System (FMSS). Another mandate came in 1993, when Congress directed federal agencies to "join the "performance management revolution." The Government Performance and Results Act (GRPA) aimed to "make government more effective and more efficient" by ensuring that people and programs worked towards specific goals that were directly tied to resources of dollars and staff time. At the same time, the Act imposed a significant planning and reporting burden. It required the NPS to prepare and update five-year strategic plans as well as annual performance plans and reports. At Sagamore Hill, park staff began to incorporate GRPA goals into their operations in 1996.[145] Then came the National Parks Omnibus Management Act of 1998, which required each unit of the system to make its strategic plan and annual performance plan available to the public by January 1 of each fiscal year.[146] Sagamore Hill's Annual Report for 1981 was a two-page narrative; its Annual Performance Plan for fiscal year 2000 totaled more than 40 pages. The latter included charts that set forth 19 specific annual goals and an equal number of long-term goals, and described how these related to service-wide goals, and how they were to be met, funded, and measured.[147]

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[144] Roger Johnson, interview with the author.

[145] Annual Report, 1996.

[146] *GPRA on the Go: Managing for Results*, version 3, WASO Office of Strategic Planning, May 2000, pp. 2-5 (copy provided by SAHI staff).

[147] "Fiscal Year 2000 Annual Performance Plan for Sagamore Hill National Historic Site," approved February 2000 (copy provided by SAHI staff).

Agency Responses to Tight Budgets

If Congress's budgets and mandates imposed burdens that were sometimes difficult for parks to meet, scarce public funding also strained the agency. One way it adapted was by parceling out funds to parks on a competitive basis that closely mimicked the way foundations distributed grant funds. The agency's so-called One Year funding programs, which included the Cultural Resources Preservation Program and Backlog Cataloging, operated like foundation grant programs: each had its own program guidelines, funding limits, application requirements, and deadlines.[148] The Parks as Classrooms program was literally a grant program. It channeled funds from the National Park Foundation to parks through a competitive grant review process managed by the Division of Interpretation in Washington. In fiscal year 1994, it expected to receive $768,000.[149]

Curator Amy Verone describes the process of obtaining One Year or Project Funds as a "crazy competitive process," which starts when park staffers sift through their list of needs, matching them as best they can to funding categories, and then writing project proposals. The superintendent next forwards these to the regional office, where a committee of park representatives and regional subject-matter experts ranks them according to priority, weighs them against other parks, and finally awards funding to some of them. Roger Johnson believes Sagamore Hill has been relatively successful at getting projects done,[150] and one reason may be that it has also done relatively well in this competition for project funds.

There were other ways for the agency to supplement meager park budgets. In 1980, amendments to the National Historic Preservation Act provided for the Park Service to raise revenue by leasing historic park properties. A program was established to do this, and in 1984, at the request of the regional office, Superintendent Schmidt reviewed its requirements. She evaluated the barn and Gray Cottage but decided it would not be appropriate to lease either of them. As for other structures around the park, they were "integral to the historic scene"; they were interpreted and open to public, so could not be leased. Sagamore Hill would not participate in the program.[151]

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[148] For example, requests for FY 95, 96, and 97 for funding under the Cultural Resource Preservation Program, Backlog Cataloging, and Museum Collections Protection Program are preserved in SAHI: Central Files, Folder H20.

[149] National Park Foundation, "Parks as Classroom Fact Sheet," November 11, 1993; SAHI: Interpretation Files, Folder: Parks in Classroom Information.

[150] Roger Johnson, interview with the author.

[151] The evaluation Superintendent Schmidt carried out was for Properties Eligible for the Historic Property Leasing Program (memorandum, Superintendent to Regional Director, NAR, October 30, 1984; Federal Record Center, Waltham, MA, Acc 79-93 0003, Box 7, Folder H-30 SAHI 1984).

A third expedient was to convene strategy groups and task forces to think up ways of stretching dollars further. The North Atlantic Region's Collections Program Task Force, established in 1992, was such a venture. The region's collections contained about 10 million items at 40 sites, and budget shortfalls were a problem for collections managers throughout the region. In 1992, Regional Director Marie Rust estimated that at existing funding levels – including all available funds from Washington and the region – it would take 14 years to draw down the cataloging backlog, and 18 to catch up with accumulated needs for stabilization, storage, and security. While the region's Collections Program had aggressively and successfully sought funds for cataloging and preserving park collections, Rust pointed out that there remained a "significant gap between what is needed to meet minimal standards and what is available." To narrow the gap, she convened a Collections Program Task Force, which would develop and propose a three-to-five-year strategy for using the insufficient funds to the greatest possible effect. She invited Sagamore Hill's new superintendent, Vidal Martinez, to join the group.[152]

More Shortages

In fiscal year 1991, Sagamore Hill's operating budget jumped from $502,200 to $637,000. This, at last, was a real increase, though not as much as it seemed. A level budget from 1981 would have equaled $580,626 in 1991 dollars. So in real terms the 1991 budget represented a 9.7% increase over that of a decade ago. Not surprisingly, Sagamore Hill continued to feel budgetary pressures during the 1990s. "Budgets were a nightmare," recalls Superintendent Martinez.[153] In 1992, the *Resource Management Plan* identified insufficient museum services staff as a particular problem. The workload "exceeds the ability of the present staff to properly carry out its responsibilities." The *Collection Management Plan* estimated that to carry out all of the division's responsibilities would require seven and a half full-time equivalents. Five were currently authorized, but only four positions were filled: a curator plus three museum technicians. To bring the department up to full performance would require adding $50,000 to the operating budget.[154]

Staff shortages continued. In 1993 – the year Sagamore Hill was voted "Most Popular Presidential Home" by elementary-school children – the park's annual report

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[152] Memorandum, Acting Regional Director Marie Rust to Martinez, June 17, 1992; SAHI: Central Files, Folder: H 20.

[153] Martinez, recorded interview with the author, January 14, 2005.

[154] Hellmich, Judy et al., *Sagamore Hill National Historic Site, Collection Management Plan* (U.S. DOI, NPS, NARO, Branch of Museum Services, August 1992), pp. 63-64. Also, Chief of Visitor Services and Chief of Museum Services, *Resource Management Plan*, p. 60.

called staffing limitations a "critical problem" affecting the curatorial, maintenance, and especially interpretive divisions.[155] That year the park faced a particularly severe challenge. The Office of Personnel Management determined that the agency had improperly used its authority to hire short-term staff. As a result, the park had to convert some "not-to-exceed-one-year" appointments to full-time employees, prompting a sudden surge in benefit obligations that had not been budgeted.[156]

All of this happened just as the park was preparing to reopen the Theodore Roosevelt Home after its six-month closure for refurnishing and restoration. When the house reopened, it was "inundated by visitors," but the carrying capacity had by now been lowered to 75 people, and visitors were admitted only on guided tours. As a result, many could not see the house. There was a great demand for more rangers and guides and, looking at the marketing efforts mounted by Long Island tourism promoters, park managers did not expect this demand to lighten significantly. They concluded that "adequate visitors' services" required adding the equivalent of six full-time staff members, or "FTEs," at a cost of $147,015.[157]

Shortages continued, however. In 1995 and 1996 the park was closed two days per week in order to remain within its authorized budget. The park had the equivalent of 20 approved full-time staff positions, but not all were filled.[158] One that Superintendent Martinez recalls as having been particularly difficult to fill was that of administrative officer: with a salary that was not competitive with comparable positions and constant worry about meeting payroll without exceeding the Congressionally appropriated budget, financial administrators tended to burn out quickly.[159] Another problem area was maintenance. At about this time, the maintenance division was leading the effort to convert the old concessions building into a visitor center. Yet the division was "hindered by limited funding and inadequate resources." Its facilities, located in a converted garage built in 1936 next to Old Orchard, did not meet federal safety standards or fire and

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[155] Annual Report, 1993; NARA II - College Park. The contest, involving elementary school children, was organized by Monsanto.

[156] "10-238 Proposal – General Management Plan, Sagamore Hill NHS," n.d. [late 1993]; NMSC – Regional Curator Files, Folder: Sagamore Hill NHS Management Objectives Workshop November 9-10, 1993.

[157] "Justification to Increase ONPS to Meet Visitor Service Demands," n.d. [late 1993]; Northeast Regional Museum Services Center, Regional Curator Files, Folder: Sagamore Hill NHS Management Objectives Workshop November 9-10, 1993). Visitation figures, as usual, do not make it easy to check the correctness of the park's prediction. In 1994 (the first full year after the reopening) it rose to 84,367; dropped in 1995 to 71,197; and climbed to 96,592 in 1997 (Annual Reports).

[158] Annual Report, 1996; SAHI: Central Files, File A 2621).

[159] Vidal Martinez, telephone interview with the author, November, 2003.

electrical codes, nor was it large enough for the work it had to do.[160] Years of tight budgets had stretched its capacity to the limit.

Supplementing Scarce Federal Dollars

Martinez tried various expedients to supplement inadequate public funding. Terminating Sagamore Hill's longstanding concession contract in 1995 and turning it over to the Eastern National Parks & Monuments Association produced financial gains for the park: Eastern National transferred part of its earnings to a "percentage donation program" to support the park's interpretive work. In 1997, the program yielded $6,765.06. Sales in fiscal year 1999 generated $7,760.88. At the beginning of fiscal year 2000, the account's balance stood at $16,746.05, and Eastern National added $8,752.48 during the course of the year; the fund underwrote interpretation and education programs, including a fall lecture series.[161] Eastern National also placed small amounts of money in a superintendent's fund, which allowed for very limited discretionary spending.[162]

Sagamore Hill soon became one of a number of parks that succeeded in capturing another earned-income stream. Sagamore Hill had always charged visitors a modest fee. Federal rulemaking had set it at 50 cents immediately after the transfer,[163] and it stayed at that level, through years of steep inflation, until Superintendent Schmidt moved to raise it in 1985. A study of other historic houses on Long Island revealed entrance fees of anywhere from two to six times Sagamore Hill's. The fee rose to $1.50.[164] Schmidt did not expect to see any drop in the number of visitors, but statistics suggest there may have been a decrease, followed by a climb back to, or even beyond, previous high levels.[165] But the numbers are hard to interpret, and if there was a decline, it may have been due to other factors.

Whether visitation went up or down would have very little effect on Sagamore Hill's finances, because NPS rules permitted the park to retain only a small fraction of its

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[160] Annual Report, 1996.

[161] Memoranda, Eastern National Parks & Monuments Association President Chesley Moroz to Superintendent, December 30, 1997, and January 21, 2000; and Superintendent to Moroz, January 26, 2001; SAHI: Interpretation Files, Folder A42: Eastern National.

[162] Amy Verone, interview with the author. Curator Verone estimated the superintendent's fund contribution at about $300.

[163] Notice of rulemaking and related documents, June-July, 1963; NARA II - College Park, Sec. Int. Class. Files, 1959-63, Box 35.

[164] Memorandum, Schmidt to Regional Director, August 16, 1985; SAHI: Central Files, Folder F5419.

[165] 1985 - 182,400; 1986 - 119,458; 1988 - 135,492; 1989 - 160,695 (Annual Reports). Annual Report 1988 comments, "visitation continues to increase at an extremely fast pace."

admission fees. That changed in 1997 with the Recreational Fee Demonstration Program. Driven in part by ongoing pressures to bring down federal spending, the program had two goals: to increase earned income by raising entrance fees, and to send more of it directly to the parks themselves. Superintendent Martinez lobbied successfully to be included in the program. Sagamore Hill's fees rose once again – from $2 to $4 dollars – and now the park would be able to keep 80% of what it collected. Suddenly it had an income stream that, within certain limits, it could control. And it was a substantial stream. Superintendent Martinez estimated that, from fiscal year 1997 through 1999, it would bring in $180,000 that would not have come to the park otherwise.[166]

The fee program's benefit to the park was clear, if one accepted that adequate public funding was not an option. The program's impact on staff, visitors, local businesses, political leaders, and the press was extensively evaluated. On the whole, it was "neutral." The public had been perplexed by the park's low fee and easily accepted the higher one. Press and politicians did not seem to care much. Staff, on the other hand, accepted the program only "with reservations." It created administrative problems such as difficulties reconciling accounts. But by 1999, it was lifting morale, at least in the cultural resources and interpretation areas. "Repair & rehab of cultural resources, historic structures is very apparent": spirits rose "as preservation projects are finished."[167]

In addition to earned income, Superintendent Martinez hoped to interest volunteers in helping out with both money and time. Spurred by new budget cuts, he launched a volunteer program early in 1994, under the banner of the NPS's Volunteers in Parks program. Like the Recreational Fee Demonstration Program, this was a service-wide effort to compensate for inadequate public funding. Martinez's goal was particularly to support the park's interpretive programs, for the house had reopened, following its refurnishing in 1993, with a new visitation policy: visitors would now be permitted only on guided tours. There was great demand for access to the house, and of course the park now had to provide tour guides. Volunteers soon began to lead tours of the house, and also to staff the front desk at Old Orchard Museum. Volunteers also did curatorial work: for example, the 1998 Annual Report noted that five volunteers had

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[166] Attachments to memorandum, Martinez to Regional Director, May 14, 1997; SAHI: Central Files, Folder F5419.

[167] Questionnaire attached to memorandum, Superintendent to Ginny O'Brian, December 19, 1997, and "1999 Management Assessment of the National Park Service Recreation Fee Demonstration Program, Phase III Survey," completed by Supervisory Park Ranger; SAHI: Central Files, Folder F5419.

updated and entered new catalog records, repaired rugs, cleaned curtains, polished silver, and helped with visiting film crews.[168]

In 1995, Sagamore Hill's volunteer program was augmented when Long Island Volunteer Enterprise – a volunteer association consisting of employees of Long Island companies – donated time to the park, painting some of the smaller buildings, restoring fences, rechipping walkways, weeding gardens, striping the access road and parking lot, and cutting fire breaks.[169]

That year, Superintendent Martinez helped launch a more ambitious scheme to build the volunteer effort. The idea of a local support group had been discussed at meetings of the Sagamore Hill Committee in the summer of 1992.[170] The Friends of Sagamore Hill emerged three years later from the volunteer corps that had been growing since Martinez's arrival: it sought to become a "partnership between residents of Long Island and the National Park Service." While the group would have a four-fold mission – Fundraising, Advocacy, Programs, and Volunteers – its founding chairperson, Walter Fish, made particular reference to government budget cuts in his appeal, and he emphasized that "it's going to be up to the committee – comprised of Long Island business, civic, and political leaders" to ensure the park's future.[171] The Friends launched a membership drive, which netted (as of 2000) a total of 144 dues-paying members, in addition to honorary members like Senators Moynihan and D'Amato, Governor Pataki, the captain of the aircraft carrier Theodore Roosevelt, and Congressman King, all of whom accepted the Friends' invitation with alacrity (but did not pay membership dues).[172]

Initially the TRA had resisted Martinez's efforts to start a local support group,[173] but the plan had gone forward. In 1997, still seeking to head off competition for supporters, [174] the association absorbed the Friends as a chapter. This brought advantages to the Friends, like the ability to use the parent organization's tax-exempt

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[168] "Sagamore Hill National Historic Site 1993 Annual Narrative Report"; SAHI Central Files, Folder: A 2621. See also Annual Reports 1996 and 1998. See also Bill Bleyer, "Plans for Sagamore," unattributed newspaper clipping, late 1993; SAHI: Central Files, Folder K32.

[169] 1996 Annual Report.

[170] Sagamore Hill Committee minutes, June 2 and July 8, 1992; SAHI Archive, Folder A42-Cooperating Associations - Theodore Roosevelt Association.

[171] Letter, Acting Chairperson Walter Fish to Patricia LeCompte, May 17, 1995, and Minutes of Meeting, June 14, 1995; SAHI: Archives of the Friends of Sagamore Hill, Folder: 1995.

[172] Friends of Sagamore Hill, Membership Report, February 2000, and Minutes of Executive Board Meeting, November 2, 1995; SAHI: Friends of Sagamore Hill Archives, Folders: Membership Information and 1995.

[173] Martinez, interview with the author, January 14, 2004.

[174] John Gable, recorded interview with the author, Oyster Bay, N.Y., August 12, 2004.

certification. It also brought advantages to the association, since all Friends members were now also required to join the parent organization. At the same time, the TRA also turned to the smaller organization for support: the Friends paid, for example, for a lunch at Sagamore Hill for association members. In theory, the TRA affiliation might be expected to bring added heft to the Friends' efforts on behalf of the park. In practice, it is not clear where the balance of benefits lay.

In 2000, the Friends adopted bylaws that expressed the broad range of the group's interests: to assist Sagamore Hill's "management programs and objectives...through advocacy, fund-raising, and other support efforts"; to work with the National Park Service to preserve the site's historic integrity as well as Roosevelt's legacy; to "serve as an advocacy group" for the site; to help with educational programs and workshops; to provide "services of coordination, education, information, publications, and other support services"; and to do anything else related to any of these goals.[175] As a mission statement, this amounted to permission to become involved in almost anything related to Sagamore Hill or to the memory of Theodore Roosevelt. In practice, the planning of events drew the greatest enthusiasm from trustees. An events committee, established in 1995, discussed such ideas as anniversary commemorations, living history performances, children's days with Roosevelt-era games, boat races, and Sunday evening band concerts. Other suggestions were reenacting Roosevelt family customs on holidays, inviting local theatrical or musical groups to "put on performances of relevance to Theodore Roosevelt's life," and enlisting volunteers to give "porch talks" to visitors and take presentation to schools.[176]

The Friends of Sagamore Hill organized some events and helped the NPS to run others. It contributed money, donating the income from two soda machines that it installed at the visitor center. It paid to design a new tour card, and bought new garbage cans; it contributed door prizes for the annual Neighborhood Night, and paint and supplies for the park's ancillary buildings. A benefit performance of "Pirates of Penzance" in 1997 brought $2,800 to the park.

Raising money was but one part of the Friends' mission. Big money was largely out of its reach, because its trustees did not include extremely wealthy or prominent people. Another factor that limited its fundraising capacity is revealed by the organization's financial report for 1997. It records that "Support to Sagamore Hill NHS" equaled $957 out of total annual expenses of $20,167. The Friends devoted an additional $2,119 to other programs that year, including Handicap Day and Fourth of July. But the

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[175] By-Laws of the Friends of Sagamore Hill, A Chapter of the Theodore Roosevelt Association," n.d.; SAHI: Friends of Sagamore Hill archives, Folder: By Laws. The label on an associated computer disk states that the bylaws were adopted in 2000.

[176] Friends of Sagamore Hill, Minutes of Meeting, July 24, 1995; SAHI: Friends of Sagamore Hill archive, Folder: 1995.

bulk of its spending – $19,529 – went towards raising funds. A single cocktail party grossed over $18,000, but it had cost the organization almost $15,000 to organize. Of the gross revenue brought in by the Friends' fundraisers that year, only 18.5% went to charitable purposes. The rest was needed to repay the organization's fundraising expenses. By the standards of nonprofit organizations engaged in raising money, that was an extremely low rate of return.[177]

In the spring of 2000, Sagamore Hill staff took the Friends on a "'behind the scenes'" tour of the park, based on which the Friends announced it would "begin to establish a long range outlook."[178] That could be good news for the park, the Friends, and the TRA. Yet the Friends' contribution in FY 2001 amounted to only $2,620,[179] and its events demanded significant commitments of time from the park's staff. Local support groups like the Friends might, of course, bring many types of benefits to the park, but Sagamore Hill's volunteer fundraising campaign had been announced in the context of anxiety over such large and basic needs as an adequate system of fire protection. The question of what role a small, grass-roots organization could play in relation to the long-term needs of a historic site like Sagamore Hill – a park whose baseline budget was approaching a million dollars, and whose most pressing needs could be measured in tens and hundreds of thousands – remained open.

In the meantime, park staff continued to work in a climate of scarcity. Maintenance Mechanic Stein recalls that, during the mid-1980s, his department was buffeted not only by repeated staff cuts, but also by shortages of basic materials. At times, he says, maintenance staff would "strip bolts and nuts and washers off things just to have a stockpile." Have these shortages been alleviated? Stein laughs: "At this point, it's just a habit."[180]

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[177] The amounts are rounded to the nearest dollar. Friends of Sagamore Hill, Schedule of Functional Expenses for the Year Ended September 30, 1997; Schedule of Net Income from Fundraising Events for the year Ended September 30, 1997; SAHI: Friends of Sagamore Hill archive, File: 1997.

[178] Letter, Patricia A. LeCompte (Chair, Friends of Sagamore Hill) to Sandy Brue and Amy Verone, May 5, 2000; SAHI: Friends of Sagamore Hill archive, File: 2000.

[179] Sagamore Hill NHS, data sheet dated May 13, 2002 (provided by SAHI administrative staff).

[180] Willy R. Stein, recorded interview with the author, December 7, 2004.

CHAPTER 5

SAGAMORE HILL AND THE THEODORE ROOSEVELT ASSOCIATION SINCE 1974

"I think our main goal is to make sure they don't continue to sit on the funds and not spend it," said former NPS Associate Regional Director Michael Adlerstein.[1] In the summer of 2000, Adlerstein was embroiled in controversy over the endowment that the Theodore Roosevelt Association had donated almost 40 years earlier. This was not entirely surprising. In 1973, controversy about unrelated issues had helped to put the endowment's purse strings in the TRA's hands, and in 1984, the Park Service had signed an agreement that strengthened the association's grasp. Now, in 2000, that agreement was due for renewal.

The year 1973 had been a moment of triumph for the TRA, but also of acrimony. NPS staff criticized the association's advisory committee as ineffective and troublesome. They deeply resented the association's "strong proprietary feeling" about the park, its "aggressive posture," and its tendency to "interpose its judgment in management decisions." The TRA was angered by agency plans it did not like: it blocked them and punished the agency.

Time moved on; tempers cooled. By 1980, the park's *Statement for Management* could report, neutrally, that "the Association is very active and extremely interested" in Sagamore Hill's operation. So was the Roosevelt family: "park management must be sensitive" to the concerns of both.[2] Certainly the park had good reason to conciliate the Association. But a smooth working relationship called for work on both sides.

In 1974, Roosevelt historian John Gable became executive director of the Theodore Roosevelt Association. His connection to the park stretched back many years, to the day, not long after Sagamore Hill had opened, when his grandparents had brought the nine-year-old boy on a weekend excursion. "My visit determined my career," he

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[1] E-mail, Adlerstein to Regional Solicitor Anthony Conte, August 24, 2000; SAHI: Curatorial Files.

[2] "Statement for Management," approved January 7, 1980, p. 7; North Atlantic Regional Office, Boston (NARO): Planning Program Files.

told a reporter many years later. "I thought, 'Oh, I've never seen such a great, exciting place.'"[3]

If the experience shaped Gable's life, it also shaped the park. Gable, who marked his 30th year as the association's executive director while this study was being written (and died shortly before it was completed), became a powerful force in the organization and a formidable presence at Sagamore Hill. He was a complex figure. Even when vigorously defending the TRA's rights and privileges, Gable could be conciliatory in tone, following a demand for power or privilege with a personal compliment, an invitation to a party, or a thoughtful reference to a family event. Gable's affability, as well as his genuine care for the park and his undoubted expertise on Roosevelt, probably went far towards restoring relations during the years that followed.

A Relationship Evolves

During Gable's long tenure, the TRA's relationship to Sagamore Hill changed in important ways. Like Gable, the association's first director, Hermann Hagedorn, had been a substantial figure. A poet and historian, he was also an accomplished organizational thinker: he had repeatedly challenged the association to replot its course, and had led the organization through a series of momentous undertakings. Hagedorn retired in 1957, and for the next 17 years the TRA operated without an executive director. Staff curators managed the two historic sites, with the help of board committees. Trustees handled the negotiations with the federal government. After the transfer, Roosevelt's children, Ethel and Archibald, became figures of special importance to the National Park Service, but the agency's relationship with the association was defined largely by board committees. In 1973, for example, it was trustees who secured the intervention of Rogers Morton. This began to change after 1974. Though it would be difficult to point to a precise moment, the contrast between the situation before 1973 and, say, after 1984 is striking. Gable's role in negotiating the first written agreement in 1984 was substantial, but by the time the agreement was renegotiated in 2000, the NPS's dealings with the TRA were almost exclusively with him. The director might choose, upon occasion, to emphasize his trustees' support; at a sensitive moment the trustees might still use their personal influence on the association's behalf; but behind the scenes as well as on stage, Gable's was the organization's most powerful voice.

With offices nearby and frequent visits to Sagamore Hill for committee meetings and other functions, Gable and the TRA were a constant presence at the park. They maintained a lively interest in every aspect of the house's preservation, arrangement, furnishing, and interpretation. NPS officials were careful to consult them. When paint

[3] Unattributed press clipping, ca. 1991; SAHI: Central Files, Folder K34.

colors were being chosen for the exterior in 1985, Andrea Gilmore, an architect in the regional office, traveled to Sagamore Hill to present the agency's decision to the association. The TRA did not immediately agree to the changes; only after Superintendent Schmidt conveyed the association's approval to the regional office, and "in light of" this approval, was the direction to prepare the specifications given.[4] The same year, Gable voiced the association's "concern and displeasure" with the state of lighting within the house, and in 1988 the park presented an ambitious program, together with a request for endowment funds, to the association. The request was approved, and a substantial amount of work was done. Soon came the *Historic Furnishings Report* with its Furnishing Plan. Though NPS staff held that the TRA had missed the first and most appropriate opportunity for comment, Gable responded in 1991 with an extensive and detailed critique. For the most part this was supportive; in a few areas it was not. Once again, Gable called for a solution to the lighting problem. The association's comments triggered the agency to respond with additional letters, memoranda, and meetings – from the park, Harpers Ferry Center, regional headquarters, and even Washington. The outcome addressed Gable's concerns in some areas, upheld park planners in others. A few years later, park leadership felt it politically advisable to include Gable in a two-day historians' workshop organized by the Organization of American Historians to plan Old Orchard's new exhibits. He participated in the discussion as a historian, but also used his position to advocate TRA priorities. Three years later, speaking for the association, he requested that he be informed and "asked for comments" as the exhibit plans were developed.[5] More recently, at the park's request, he has briefed volunteer docents.

Gable's was also a prominent voice in the press, sometimes overshadowing the NPS itself. Local reporters would frequently go to him for quotations; at other times, superintendents referred reporters to him, believing that he could talk more freely to the press than a government servant. Either way, his was often the only voice on park issues. Gable himself was aware of the power this gave him. "I seek no public controversy, I assure you," he wrote to Superintendent Martinez in the aftermath of their disagreements over the Furnishing Plan. Yet he told Martinez exactly which aspects of the plan he would support and which he would "decline to defend" to the press.[6] On the whole, Gable used his press presence to support the park, even when disagreements with park management persisted. During the funding scare of 1995, Gable supported the Park Service unreservedly.

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[4] Memorandum, Chief, Historic Preservation to Associate Regional Director, D&RP, March 5, 1985; Federal Record Center, Waltham, MA, Acc 79-93 0003, Box 7, File H-30 SAHI 1984.

[5] Letter, Gable to Marie Rust, Joseph Avery, and Lorenza Fong, January 20, 2001 (document supplied to author by John Gable).

[6] Letter, Gable to Martinez, January 30, 1992; SAHI, Central Files, Folder: A 42.

To the casual observer, the sheer size of a federal agency like the NPS might seem to elevate it above concern with local press coverage, but the reality is quite different. Local politicians are sensitive to local press, and local politicians hold the agency accountable when they sit in Congress. John Gable's access to local press was one reason park officials treated him with deference. There were others: it was not any single dimension of the association's power, but rather the combination of many that inspired respect.

Perhaps even more important was the TRA's influence with higher officials in Washington. This the association carefully cultivated. In the 1960s, the TRA kept open a revolving door for NPS officials. Sometimes those officials managed to be on both sides of it at once. Horace Albright (Conrad Wirth's former boss) had joined the association before 1960; he continued to serve on the Advisory Board on National Parks. During the 1960s, both Wirth and Lee joined the association's leadership. Lee continued to hold an appointment as special advisor to Director Hartzog while serving on the association's board and its Sagamore Hill Advisory Committee.

Entanglements reached down to the park level. Noteworthy were the examples of Helen MacLachlan and Jessica Kraft. In 1961, Oscar Straus had ensured that the Park Service would retain these trusted and long-serving TRA employees as curators of the two houses. Shortly after the transfer in 1963, the association chair raised the question of whether they might continue performing their accustomed duties for the association, now that they were full-time employees of the government. Lee ruled that they could work for the association on weekends.[7] And so Helen MacLachlan continued to serve as the TRA's assistant secretary, sometimes signing the executive committee's minutes. She also served as secretary to the Advisory Committee. All in all, the committee presented an interesting picture, with two NPS veterans as its most vocal advocates, and a current park employee as its secretary.[8] Nor did entanglements end there. The TRA elected Jessica Kraft its assistant treasurer in 1966. And while serving the NPS as Sagamore Hill's curator, she also accepted donations of objects on behalf of the association. These conflicts did not end until the retirement of both curators from the NPS in 1974. At that time, Helen MacLachlan also retired from the association, but Jessica Kraft took on "added responsibilities given her by the executive director" – the newly appointed John Gable.[9]

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[7] Letter, Lee to Nichols, December 18, 1963; Harpers Ferry Center, Papers of Ronald Lee, Box 9, Folder: Mr. Lee 2-25.

[8] For example, Helen MacLachlan signed the Advisory Committee minutes of February 10, 1964, as "Curator" and those of November 18, 1970, as "Secretary."

[9] *Assistant treasurer*: TRA Executive Committee Minutes, November 29, 1966; *donations*: letters in TRA Papers, Box 9, Folder 12, "Museum Donation Letters"; *retirements*: Executive Committee minutes, November 23, 1973; *new responsibilities*: Executive Committee minutes, June 6, 1974.

In situations like these, a person's sense of loyalty, in the event of a conflict between the two organizations, could hardly help but be torn. In later years, such conflicts of interest would be recognized as a serious problem; formal policies would prohibit them. But there is no evidence that the participants recognized conflicts of interest as a problem. When Lee had to rule on whether Jessica Kraft and Helen MacLachlan could continue working for the TRA, he did not interpret this as a conflict of interest question. It was simply a matter of ensuring that they worked the requisite hours for their primary employer.

By the 1970s, at any rate, the most obvious conflicts of interest were disappearing. But the TRA continued quite aggressively to cultivate political influence in other ways. Political influence had always been part of the park's history: it had speeded its acceptance by the NPS, and shaped the terms on which it took the Birthplace and the endowment. The association's effect on the Secretary of the Interior in 1973 had been almost magical. Since then, Gable worked behind the scenes to ensure that the association's internal politics always produced board leaders with "clout," and through seven presidential administrations he nurtured an understanding that, as caretaker of a presidential home, the association could call upon each sitting president for at least one special favor – a reception, an award, an endorsement.[10] That the TRA did not actually manage either Sagamore Hill or the Birthplace seems not to have affected this understanding. Whenever the association felt that its interests at Sagamore Hill were threatened, it was ready to appeal to Washington. Sometimes the channels used by association trustees were so private that Gable claimed not to know exactly who or what was traveling along them.[11] But Gable himself was the TRA's most tireless advocate. He appealed to Washington in 1992 over the issue of the Furnishing Plan;[12] and again, in 2000, he wrote to NPS Director Robert Stanton to protest the agency's decision to cut funds for the Old Orchard Museum upgrade.[13] On that occasion, the association intervened in support of the park. Yet at the same time, Gable was engaged in an unrelated dispute with the agency. At his urging, Theodore Roosevelt, IV, reached above Stanton to the Secretary of the Interior in an attempt to block the agency from gaining access to endowment funds that were also needed for the Old Orchard project. At the same moment that the TRA was lobbying in Washington *for* the spending of tax dollars on a project it argued was vitally important, it was lobbying *against* using endowment dollars for the very same project.

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[10] John Gable, recorded interview with the author, August 12, 2004 (recording at Sagamore Hill).

[11] Gable, recorded interview.

[12] Letters, Gable to NPS Director James Ridenour, January 3, 1992; TRA. Gable also protested to the Regional Director and the Director of the National Park Foundation (NPF): letters, Gable to Patten, January 2, 1992, and to Alan Rubin, January 3, 1992; both TRA.

[13] Letter, Gable to Stanton, June 20, 2000; SAHI: Central Files, Folder: A42.

The TRA's regular recourse to Washington reflected Gable's understanding not only of presidential favors, but also, quite specifically, of how the Park Service operated. During the dispute of 2000, Gable advised his board that the "solution" was for the association to "push" its point of view "in Washington at the highest levels." He believed the NPS regional office could be "forced to sign, and short of being forced they would probably cave if they thought we were likely to win." The association's contacts in Washington, he noted, had already "scared Philadelphia [i.e., the regional office], but not enough to back down even an inch."[14] He concluded that more pressure on Washington was needed.

It is possible to understand the Theodore Roosevelt Association as a watchdog or advocacy group, and a highly effective one at that. Like other watchdog groups, the association sometimes supported its chosen agency, sometimes opposed it. The association's critique of the Furnishing Plan, complimentary as well as critical, was intelligent, knowledgeable, thorough, and gracefully presented. Appropriately, the NPS paid attention, as any responsive government agency would, to such a persuasive public voice.

Yet the TRA was not just a watchdog group, a public voice. In many instances it was the *only* public voice. It is not that the agency muffled or ignored other voices. But the association frequently dominated both public policy input and agency response to it. Although Congress had passed the Federal Advisory Committee Act in 1972 to ensure that federal entities including parks received a broad spectrum of public advice, 20 or even 30 years later, the public voices heard by the NPS still tended to be overwhelmingly *one* public voice: that of the TRA.

And this, of course, was due less to the association's success as a watchdog than to the fact that it was so many other things, as well. It was Sagamore Hill's former proprietor; it was the NPS's tenant and cooperator; its collections and archives were intermingled with those of the two parks; it was a benefactor that continued to grip the purse strings of the endowment it had given; and it was, officials hoped, the source of future benefactions. This was a great many roles for a single organization to play, and both Gable and the Park Service had difficulty separating them. Though Gable's credentials as a historian, for example, justified his inclusion in a 1998 workshop on the proposed new Old Orchard exhibits, it was his "stakeholder" status that gained him admission, and his leverage over endowment funds that gave his input special weight. It might be entirely fair for the association and Gable to play each of their many roles with great vigor; yet taken altogether, the effect might still be overwhelming.

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[14] Gable, Memorandum to Theodore Roosevelt, IV, Judge Kupferman, and Brian H. Madden, September 9, 2000 (document supplied to the author by John Gable).

Part of the problem was that the TRA's emotional identification with Sagamore Hill was uncomfortably close. As early as 1966, architect Barnes commented on the association's "over active interest in Sagamore Hill developments"; administrator Landau complained in 1973 of its "extremely strong proprietary feeling about the two sites." Rather than diminishing, that feeling seems to have grown over time. In 2000 a visiting team of NPS managers worried that the TRA misrepresented its role at the park to its own members, who "may not even know or care that the National Park Service administers Sagamore Hill or the Birthplace. The executive director seems to be a sort of 'gatekeeper' between the park, board members and membership." The association's relationship to the agency, concluded the managers, was a problem urgently requiring solution.[15] Perhaps it was only symptomatic that a magazine profile of John Gable described the TRA as "a nonprofit organization based at Sagamore Hill" – even though its offices were, in fact, located several miles away.[16]

Gable's emotional relationship to the park was not only close but complex. "He always had this sense that we were adversaries," recalls former Superintendent Vidal Martinez. He could be "very challenging. . .manipulative." Yet, says Martinez, he was also "my back-up partner." Perhaps part of the answer was that, as an official of the National Park Foundation put it, "Dr. Gable wants to see himself as superintendent of the properties."[17]

On these questions, the voices of the TRA itself have not always been reassuring. Nine years after accepting the donation on behalf of the U.S. Government, Conrad Wirth (now speaking as an association trustee) referred to the endowment as "the Association's money." It might have been a figure of speech, but Wirth demanded that the NPS return the parks to the association if it would not manage them according to the association's wishes. Dr. Gable himself proposed what is perhaps the truest estimate of the situation. "Without Theodore Roosevelt Birthplace and Sagamore Hill," Gable explained to his trustees in 1988, "the Association would lose much of its reason for existing, as well as its historical roots and identity."[18] This was 25 years after the association had given away the houses. It was 45 years after Hermann Hagedorn had wondered whether the TRA should simply close. The purchase of Sagamore Hill in 1950 had given the association a sense of purpose when one was needed; the emotional separation that one might have expected to see, 13 years later, when it gave away its two

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[15] Memorandum, Rebecca L. Harriet to Regional Director, August 31, 2000; SAHI: Central Files.

[16] Ann Starr, "The President's Man," *Kenyon College Alumni Bulletin*, summer 2004, p. 45.

[17] Telephone interview with author, February 27, 2003. The official wished to remain anonymous in view of the sensitive nature of the issues.

[18] *Hagedorn*: TRA Minutes, October 27, 1943. *Gable*: John Gable, "The Sagamore Hill Committee and the Prologue of the Past" (typescript), October 1988, p. 5; SAHI, TRA Papers, Folder 42, "Cooperating Associations – TRA."

houses, had never fully taken place. The houses simply meant too much to the association.

THE ENDOWMENT

Beyond power and influence, it was money that made NPS officials respectful. From 1960 onwards, government officials periodically hoped for further gifts from the TRA. The Park Service at first expected an endowment of $850,000, then $750,000. After it was set at $500,000, hints of possible future gifts continued to echo through the Congressional debates. These hopes were soon dashed, yet the possibility of further donations continued to be excited from time to time. In 1984, an early draft of the cooperative agreement raised the possibility of additions to the endowment or annual contributions. And in 1993, NPS officials told a reporter that the Theodore Roosevelt Association was "setting up a fund-raising committee to help" the park meet pressing needs, including fire protection.[19] At times, the association has encouraged the NPS in this hope. In 1988, the park believed it had been told that the association's new Sagamore Hill Committee would hold fundraising events. That year the association entered into a two-year agreement with a private firm, Machol Media, to seek private support for park projects; the enterprise went so far as to create a draft grant proposal that could be sent to funders.[20] In 2000, seeking leverage with which to salvage threatened government funding for Old Orchard Museum, Gable told NPS Director Stanton that the association was "discussing means and methods for raising or securing additional funds for this companion project."[21]

If little came of these initiatives, it was not because the TRA was reluctant to raise funds. In 1989, it launched a capital campaign to endow the Roosevelt Study Center and the Roosevelt Collection at Harvard, and to enhance its own endowment, but Sagamore Hill was not one of the beneficiaries.[22] In 1995, a locally based group, the Friends of Sagamore Hill, was formed in part to raise money for the park. The association took it

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[19] Bill Bleyer, "TR's Mansion Called 'Terrible Timebomb,'" *Newsday*, November 25, 1993; clipping in SAHI: Central Files, Folder K34.

[20] Documents in SAHI: Central Files, Folder A42.

[21] Sagamore Hill NHS, Annual Report, 1988; NARA II – College Park, FRC Boxes, n.p.: "The parks [*sic*] enthusiasm and sincerity to good community relations has resulted in the re-development of the 'Sagamore Hill Committee' by the Theodore Roosevelt Association. This Committee will be instrumental in developing fund-raiser programs for Sagamore Hill National Historic Site." *Machol Media*: the agreement was concluded on December 30, 1988, the "Draft Grant Proposal" created the following May; SAHI: Central Files, Folder A 42. *2000*: letter, Gable to Stanton, June 20, 2000; SAHI: Curatorial Files.

[22] "Theodore Roosevelt Association Capital Funds Drive Report: June 17, 1989"; SAHI: Central Files, Folder: A42.

over as a chapter and took credit for its fundraising efforts.[23] But once again, promises outstripped performance. In 1998, when the Organization of American Historians was involved in planning new exhibits for Old Orchard, Gable assured its director that "the potential exists of the Friends being a significant supporter" of the Old Orchard Museum project.[24] The record did not support this assertion: neither before nor after its absorption into the association did the Friends raise significant sums for the park, and there is no evidence that it considered taking on the Old Orchard Museum project. It did, on the other hand, absorb a good deal of the park staff's time and attention.

Balancing hopes of additional funds was the NPS's fear that the association might block access to the existing endowment. Some agency officials have expressed the view that controversy over the endowment has been merely one strand in a long, close, and largely fruitful relationship; that it was not even a very important aspect of the relationship. Yet in 2000, as the cooperative agreement was being renegotiated, the NPS's visiting management team concluded that the agency's relationship to the association "stood out as the most urgent issue" demanding resolution, and at its root lay conflict over the endowment.[25]

By 2000, that endowment had grown to well over $2 million, yet this ample reservoir was releasing the merest trickle of funds. Adlerstein's frustration was understandable. Yet the conflict was both deeper and more complex. Its origins lay, of course, in the resolution of the crisis of 1972-73. More immediately, it stemmed from the Cooperative Agreement of 1984, a document which had formalized the relationship worked out since 1973. This was to be the first in a series of such agreements. Careful analysis of them furnishes the best way to understand the long-running conflict over the endowment.

COOPERATIVE AGREEMENTS

The Cooperative Agreements of 1984 and 1995

It was Superintendent Pearson of the Theodore Roosevelt Birthplace who first proposed a written agreement. Speaking to the Theodore Roosevelt Association's executive committee in 1982, he noted that such agreements were common at NPS areas, and he soon presented a draft. Although Gable felt that the Theodore Roosevelt

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[23] See letter, Gable to Secretary of the Interior Bruce Babbitt, August 10, 2000: discussed subsequently.

[24] Letter, Gable to Dichtl, August 7, 1998; SAHI: Interpretation Files, Folder: Historians Conference.

[25] Memorandum, Rebecca L. Harriet to Regional Director, August 31, 2000; SAHI: Central Files.

Association's records were sufficiently "clear on all aspects of the relationship," he agreed that a written agreement would reduce the confusion resulting from frequent policy and personnel changes at the agency.[26] The TRA's executive committee reviewed Pearson's draft in December, and there was much unhappiness. "Apparently the National Park Service disclaims a 1962 guarantee of office space being allocated for the Association; object to having to obtain approval of the Association for handling the income from the Theodore Roosevelt Endowment Fund, claiming they never accepted this procedure; and state that each time a new Superintendent or Supervisor is appointed at the sites problems arise, thereby requiring an agreement."[27] The committee deferred action pending discussions with the National Park Foundation.

In April 1984, following further negotiations with the agency, Gable produced a revised draft that aimed to "maintain and support those rights which the TRA has traditionally claimed."[28] Yet the committee was still critical. "The TRA had given so much to the National Park Service by its gifts," noted Judge Hogan; why was an agreement necessary? "We are not coming as suppliants," said TRA President Johnson; "the Association is not willing to have its hands tied by an agreement." Besides, the agency's text "lacked historical perspective, and did not reflect the history of the Association's involvement with Theodore Roosevelt Birthplace and Sagamore Hill, or of the Association's many good works through the years." At least, said Hogan, there ought to be a preamble "setting forth in detail what the TRA had deeded, contributed, etc., to the NPS." The association's rights should be guaranteed into perpetuity.[29] The agreement should grant the TRA free use of both Sagamore Hill and the Birthplace.[30]

After a further exchange of drafts, the Cooperative Agreement was signed on December 26, 1984.[31] It was such as to please the TRA's stoutest champions. On one level, it introduced little that was new. With regard to its overall management of the property, the Park Service did not commit itself to do anything beyond what law and policy already required.[32] For its part, the association appeared to undertake a list of

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[26] TRA Executive Committee Minutes, meeting of May 8, 1982. The draft was distributed at the meeting of August 11, 1982 (Minutes).

[27] TRA Executive Committee Minutes, December 4, 1982.

[28] Gable, "Report to the Executive Committee," April 13, 1984. The NPS representatives in the negotiation had included the Regional Director and the superintendents of Sagamore Hill and Manhattan Sites. The TRA had been represented by Gable and Peter R. Fisher.

[29] TRA Executive Committee Minutes, meetings of May 5 and June 23, 1984.

[30] TRA Executive Committee Minutes, meeting of November 17, 1984.

[31] The agreement was signed for the NPS by the Regional Director, and for the TRA by Gable and President William Johnston.

[32] The NPS agreed to manage the sites "according to plans developed through a documented process of public participation, commensurate with available appropriated funds," and to "provide

specific actions, yet all hung on a conditional: that "consideration will be given" to helping the NPS "by such means as the Association decides."[33] That was both noncommittal and vague. A clause mentioning the possibility of direct financial support, either through annual contributions or "increasing the endowment," was dropped from the final document.[34]

Other provisions were also insubstantial. A great many "Whereas" clauses served to paint a picture of a warm, collegial relationship. For example, whereas the April draft had referred neutrally to the legislative requirement for a written agreement, the final version pointed to a mutual "desire...to reduce to writing the responsibilities, duties and privileges of each to the end that the cooperative and harmonious relationship shall continue."[35] This was not an entirely empty rhetorical flourish. Gable believed that a formal agreement would confirm many points that had been "largely a matter of tradition" and had sometimes been disputed.[36] It would, in short, "maintain and support those rights which the Association has traditionally claimed."

There were four such rights, and the Park Service made definite commitments to respect two of them. The agency agreed to provide, first, free office space at the Birthplace, and free storage space for the association's stock of sales publications and its "archival materials, books, Roosevelt memorabilia, artifacts, and the like." The NPS also agreed to provide free use of Sagamore Hill and the Birthplace for annual meetings and dinners, meetings of the board and committees, the annual public speaking contest, and "special programs and the like." It also agreed to provide black-and-white copy photographs at cost.[37]

The agreement's provisions regarding the third and fourth rights were less clear-cut. In regard to the third – to "review the annual funds for the sites from the National Park Foundation" – the NPS agreed to "submit to the Association for review and

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technical and professional staff to preserve, protect, maintain, and operate the Sites in accordance with Statements for Management and other approved operating plans, commensurate with available appropriated funds"; "Cooperative Agreement Between the National Park Service and the Theodore Roosevelt Association, December 26, 1984," Articles II.a-b.

[33] "Cooperative Agreement," 1984, Article I.a-f. The means of assistance noted in the Agreement included "providing an annual appropriation" for the two houses (either from its own funds or funds raised from the public); assisting the NPS in acquiring or paying to take care of furnishings and other collections; supporting development of an educational program (including information kits and audiovisual materials); sponsoring lectures and other programs; supporting the development of a public relations program to build the audience; using its nonprofit status where useful (for example, in obtaining foundation grants or sponsoring government-funded work-study programs); and helping to provide technical or specialized professional expertise beyond what the NPS could provide.

[34] See "Cooperative Agreement," 1984, first draft, Article I.a; SAHI: Curatorial Files.

[35] "Cooperative Agreement," 1984, p. [2]. The same text appears in the third draft.

[36] Gable, Report to Executive Committee, April 13, 1984, p. [1].

[37] "Cooperative Agreement," 1984, Article II.a-h.

concurrence, the annual Service funding proposal for the Theodore Roosevelt Endowment in accordance with the Act of July 25, 1962."[38] As will be shown below, the meaning of this phrase would prove to be less obvious than it seemed.

Though Gable claimed that the agreement confirmed the fourth prerogative – "the right to take part in the formulation of policy at the sites"[39] – it was in fact silent on the subject. The explanation for Gable's claim may lie in one of the preamble's many "Whereas" clauses. Here, after alluding to the TRA's consulting role in establishing an advisory committee, the text described the association as "successor to the Advisory Committee" and noted that it had "cooperated since 1962" with the Park Service "in matters affecting the preservation, development, and management [of the two sites]…."[40] If the two organizations had "cooperated" in the past, one might infer that they would continue doing so. In fact, Gable's claim to policy participation was not entirely groundless. In the early years, the Park Service had assiduously sought association opinion on a wide range of issues, and the final version of the park's *Master Plan* had promised to consult the advisory committee "on matters relating to the preservation, development and management" of Sagamore Hill.[41] But this was the Advisory Committee, which ceased to exist as a legal entity following the passage of the Federal Advisory Committee Act. The 1984 agreement asserted that the Theodore Roosevelt Association was the advisory committee's "successor," and certainly that had been Interior Secretary Morton's intent. But did this make the association, *in fact and in law*, the committee's successor?

Soon after the agreement was signed, Sagamore Hill made specific arrangements to implement its provisions. Though these did not include advising on policy, the park did provide the TRA with meeting rooms at Old Orchard. It also instituted a policy whereby staff from the two parks, together with the regional director, would meet annually with the Association's trustees to consider endowment spending proposals.[42]

In 1995 Sagamore Hill's cooperative agreement, which had been renewed in 1984 and expired in 1989, was renewed for a further five-year term. A separate but almost identical document was signed the following year for the Birthplace.[43] There were few

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[38] "Cooperative Agreement," 1984, Article II.i.

[39] Gable, "Report to the Executive Committee," April 13, 1984, p. [1].

[40] "Cooperative Agreement," 1984, p. 2.

[41] *Master Plan*, September version, vol.1, chap. 1, p. 7; approved chapter: Northeast Museum Services Center, Charlestown, MA (NMSC).

[42] Annual Report, 1985; Harpers Ferry Center, SAHI Box: Miscellaneous, Folder: Annual Reports.

[43] "Memorandum of Agreement Between the National Park Service, Sagamore Hill National Historic Site and the Theodore Roosevelt Association, July 12, 1995"; and "Cooperative Agreement Between the National Park Service Manhattan Sites and the Theodore Roosevelt Association,

changes. One was to remove the puzzling reference to the Advisory Committee and, in its place, to claim that the enabling legislation had directed the Secretary of the Interior to consult the TRA "for fundraising, development, and the preservation of Sagamore Hill National Historic Site."[44] This was not puzzling: it was simply untrue: the consultation called for in the legislation had been specifically limited to the establishment of an advisory committee. The change may have been made in an attempt to support the association's case for a broader role in managing the park. The correct language, however, continued to appear in the 1996 Birthplace agreement.

Another change was clearly meant to buttress the TRA's right to exercise "review and concurrence" over endowment spending. According to the new agreement, the association would tell Sagamore Hill's superintendent how much money was available from the endowment "to determine projected proposals for preservation and maintenance needs of the site."[45] In the 1970s, the association had sought to become the channel for funding requests: now it would also become the conduit for information. The memorandum did not make clear whether the TRA would simply transmit what the foundation said, or whether it would play an active role in setting spending levels. If the latter, then the association would control not merely how the endowment's income was spent, but also how its corpus was defined and perpetuated.

There is evidence that the Theodore Roosevelt Association not only envisioned, but actually played, such a role. "It has been the policy of the TRA," Gable wrote to John Dichtl in 1998, "to keep at least $100,000 in the income account for emergency use and for special subtantial [*sic*] projects."[46] True, the income account was not the corpus. Yet by keeping income-account funds unspent from year to year, and by asserting authority over their disbursement, the association effectively created its own corpus or principal account. As we shall see, the TRA's spending restraint could be partially justified as a fiscally prudent response to the National Park Foundation's accounting practices. And in 2000, the association campaigned successfully to transfer much of the unspent income under its *de facto* control into the officially recognized principal account. But still, the association had held back far more money than fiscal prudence required. The fact was, the less it allowed the Foundation to spend, the bigger would be the sum of money under its own control. In many ways, the TRA by the end of the 1990s could be said to be managing its own quite substantial endowment fund.

February 23, 1996." The agreements were signed by Gable on behalf of the TRA and by the respective superintendents for the NPS.

[44] "Memorandum of Agreement," 1995, p. [1].

[45] "Memorandum of Agreement," 1995, Article I. d.

[46] Letter, Gable to John Dichtl, September 7, 1998; SAHI: Interpretation Files, Folder: Historians Conference.

This degree of control appears to have exceeded any right "traditionally claimed" by the association. Arguably it also interfered with the foundation's fiduciary obligations to National Park Service, as the fund's beneficiary. Certainly it went far beyond "review and concurrence." Yet this phrase, enshrined in the 1984 agreement, remained the touchstone for TRA claims regarding the endowment, which indeed became more sweeping as the association negotiated a new agreement starting in 1999. To understand the next in the series of agreements, therefore, it is essential to tease out the intended meaning of this deceptively simple phrase. Did review and concurrence mean that the TRA could "only approve spending proposals, after looking them over, and not disapprove of or negate" them? This was what Gable believed the NPS was arguing in 2000. It amounted to a strict construction, which Gable called "false, uninformed, and totally unsupported by the record."[47] Or did it mean what the TRA said it meant, that the association held "veto power," i.e., the authority to make binding decisions on endowment spending?

Review and Concurrence

In 2000, when Gable asked Theodore Roosevelt, IV, to step into the negotiations on behalf of the Theodore Roosevelt Association, he assured him that "superficial research in documents held by the National Park Service would reveal the meaning of the words 'review and concurrence,' even if common sense or a dictionary could not resolve the matter."[48] It was not that simple. Though the record since 1973 includes interpretations consistent with Gable's, a broader study reveals not clarity but confusion.

The fact was, as Regional Solicitor Anthony Conte has pointed out, the phrase could not be defined with precision: it did not denote any legally recognized standard or procedure.[49] Yet the words were in common usage among NPS staff, and as the 1984 agreement (like other such documents) was drafted by agency staff, rather than by lawyers, it is to agency usage that we must look for guidance. By itself, the word "review" would present few problems: it means simply the opportunity to be consulted and to have one's views considered. This, incidentally, was the traditional right claimed by Gable in 1984. It is "concurrence" that raises difficulties: did the right of concurrence give the TRA the authority to block spending with which it did not concur?

It is possible that the word "concurrence" was adopted in the 1984 agreement simply because it was the term used by Regional Director Jerry Wagers immediately after the changes of 1973 to signify the informal approval sought by the National Park

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[47] Memorandum, Gable to Theodore Roosevelt, IV, August 23, 2000; SAHI: Curatorial Files.

[48] Memorandum, Gable to Theodore Roosevelt, IV, August 23, 2000; SAHI: Curatorial Files.

[49] Anthony Conte, telephone interview with author, 2003.

Foundation. At any rate, it is the word recorded in the association's minutes, and its appearance there became the foundation of Gable's later claim that "review and concurrence" was in place before his arrival in 1974:

> Mr. Wagers said the National Park Foundation which administered the endowment funds would like to have the concurrence of the group who had contributed to the fund and in this case that would be the Theodore Roosevelt Association. He said that while a letter was not necessary, the indication of the Executive Committee that the planned expenditure of funds appropriated was all the indication they needed....[50]

This, of course, does not clarify the issue, because it does not make clear whether the NPF was prepared to act without the association's concurrence. In any case, the foundation was hardly in a position to do more than express a preference, since none of the legal authorities governing the fund so much as mentioned the TRA in connection with endowment spending.

Within the National Park Service, the word concurrence was used in connection with a wide variety of processes involving the review of documents or actions. They reveal an equally wide range of meaning. In the spring of 1984, NPS director Russell E. Dickenson circulated new instructions for reviewing planning documents that sought to involve the Washington office more actively in planning. Regional directors would retain authority to approve planning documents, but now, "before a document can be approved, it must have the Director's concurrence." That concurrence was no mere formality: the director would send the regional director not only "general comments" but also "specific changes that must be made." He might require submission of a revised draft or schedule meetings to "clear up confusion."[51]

The director's right to dictate changes before approval owed more to his superior authority than to procedural rules governing concurrence. In most instances, it was the approving party who held the superior position within the chain of command: lower-level staff indicated their concurrence as a proposed action or policy moved up the chain. Approval was invariably the end point of such processes, the last and definitive step towards authorizing an action.[52] Getting there might require two, three, or four

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[50] TRA Executive Committee Minutes, August 25, 1973.

[51] "NPS –2: Supplemental Instructions for Review of Planning Documents," with covering memorandum from Director Dickenson to Regional Directors, April 23, 1984; Harpers Ferry Center: National Park Service History Collection, Record Group 22 [Administrative Manuals].

[52] Examples of approval: 1) "Draft plans and proposals are recommended at the park....[The] Regional Director sends it to the manager of Harpers Ferry Center for review....Manager, Harpers Ferry Center, recommends plan to the Regional Director. Authority for approval rests with the Regional Director and must be secured *before* any commitments to production are made"; Interpretation guidelines, *NPS-6, Release No. 3,* August 1986, Chapter 5, p. 1.) 2) Superintendent has "final review and approval authority for all aspects of this project"; Project Agreement, Sagamore Hill

signatures. One common two-step version started with "Concurrence." The four-step version began with "Prepared" and led through "Recommended" and "Concurred." On documents such as these, the signatures are always dated in the order given, and approval is always the final step. There were other approval ladders: a common two-step version leads from "Recommended" to "Approved," bypassing "Concurrence" altogether.[53] In 1992, the park's *Collections Management Plan* ascended a three-step ladder, being first "Recommended" by the superintendent, then "Concurred" by the Regional Curator, and finally "Approved" by the Regional Director. What was consistent in all of these processes is that concurrence was an intermediate form of sign-off by someone whose agreement had to be sought before the action could be taken. Confusions do arise. When the TRA proposed to recalculate the endowment's principal at the end of 1999, TRA and NPF documents noted that the parks' "concurrence" was required before the change could be made. Yet in granting it, Superintendent Martinez did not use the word concurrence: instead he signified his "agreement and support with" the measure.[54] As Conte says, these terms cannot be sharply defined. Nor were they used with precision.

Another context in which NPS officials frequently encountered concurrence was in the review process spelled out by Section 106 of the National Historic Preservation Act for federal actions affecting historic resources. Under Section 106, agencies preparing to take such actions – the National Park Service, for example – are required to consult State Historic Preservation Officers and the federal Advisory Council on Historic Preservation. This process more closely resembles that envisioned for Sagamore Hill's endowment, in that the concurring parties are outside the agency's own chain of command. Section 106 required that concurrence be sought at many junctures, yet the process was designed to ensure that agencies could implement their plans without obtaining it. For example, according to regulations in force during the 1980s, if the initiating agency found that its action was not adverse, it had to obtain the State Historic Preservation Office's "concurrence" with this finding.[55] If the state did not concur, the action would be classified as adverse. That would trigger a new round of

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NHS, Old Orchard Museum: Exhibit Planning, Design, and Production, June 20, 1998, p. D-1. SAHI: Interpretation Files, Folder: HFC Exhibit Plans.

[53] *Two-step process* (various Project Directives, 1995, attached to memorandum, Acting Superintendent Amy Verone to Chief, Engineering and Maintenance, New England System Support Office; SAHI: Central Files, D 2621). *Four-step process*: Christopher J. Merritt, "Scope of Collection Statement – SAHI," February 1986. SAHI: CRBIB, Box No. 11. *Two-step Recommended/Approved process*: *Interpretive Prospectus*, 1971 (approved 1970: SAHI - CRBIB 010475).

[54] Letter, Vidal Martinez to Claudia P. Schechter, January 14, 2000; SAHI: Curatorial Files. See also memorandum, Chief, Environmental Compliance David E. Clark to Regional Director, August 25, 1978: "I recommend your signature of approval and concurrence....."; NARO: NEPA Files.

[55] 36 CFR Ch. VIII Part 800.5 (d)(i), edition of July 1, 1988.

consultation, but in the end, having exhausted the consultative process, the agency could go forward with its plans, even if the consulting party withheld its concurrence. The word "concurrence" does not appear very often in the rules in force during the 1980s; rules currently in force use it more frequently, but with little change in meaning. For example, the Advisory Council explains that "concurring" parties differ from the "invited signatories" to a memorandum of agreement, in that the "concurrence" of the former "is sought only to indicate that they are in agreement with the terms of the Memorandum of Agreement."[56] If they are not, the memorandum remains valid, even without their agreement. Section 106 also permits actions to go forward in the absence of any response at all from a consulting party. In general, then, concurrence under Section 106 is something that agencies must seek, but need not obtain. There are exceptions. An agency official wishing to expedite the consultation process "must obtain the concurrence" of the State or Tribal Historic Preservation Officer: "Unilateral alteration of time periods set forth in the regulations is not permitted."[57] This exception, it should be noted, concerns a procedural change rather than a substantive outcome.

It appears impossible to define concurrence apart from a specific context. And at Sagamore Hill, that context was the "concurrence," by a private organization, in requests by a government agency to spend money from a fund that belonged to the government and existed for the express purpose of covering those expenditures. This was not a context for which clear precedents existed. In later years the TRA would model its claims on those that a foundation would make regarding the grant funds in its own endowment. That is, it would interpret concurrence as giving the association decision-making authority over the funds; however, this concept does not seem to have been clearly formulated in the minds of Gable or his trustees in 1984. As for the NPS, there is no evidence that the agency believed it was giving the association veto power or anything like it. It seems more likely that officials saw concurrence as an indication of agreement with a proposed action. They bound themselves to seek that agreement. But overall patterns of agency usage do not support the position that they bound themselves to *obtain* it before taking action. Unfortunately, the Cooperative Agreement did not say what to do if the consulting party did not concur. Perhaps agency officials simply never considered the possibility that this might happen. It may also be that the officials were unwilling to grant the control over endowment spending sought by the TRA, but did not want to provoke an open clash with the politically powerful association. They thus may have chosen the only remaining option: a studied ambiguity.

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[56] "Section 106 Regulations: Section-by-Section Questions and Answers," on the Advisory Council's website at www.achp.gov/106q&a.html#800.6 (consulted in April 2005). For the current regulations themselves, see the Council's website at http://www.achp.gov/regs-rev04.pdf.

[57] "Section 106 Regulations: Section-by-Section Questions and Answers."

If the Cooperative Agreement failed to specify a critically important dimension of "review and concurrence," there is nevertheless much that we can glean from the discussion. The agreement appeared to place the association's power somewhere between *pro forma* and substantive review. It granted a right to question or comment on a proposal, but this right was distinct from final decision-making authority. For this higher power, agency usage reserved the word "approval," except in rare instances where the concurring party held an unquestionably superior spot in the chain of command. This much is clear. So is a second point: concurrence was by nature a reactive power. The agency would propose certain actions, the TRA would express an opinion on them. There was nothing in "review and concurrence" to imply that the association could initiate its own spending proposals, much less define the endowment's corpus or establish investment policies. Nevertheless, these were all actions that the association would eventually take and justify on the basis of its right to concur. However, none of this was spelled out in the agreement. Its language blurred the distinction between giving advice and making decisions, and perhaps even encouraged the association to cross the line. "Review and concurrence" was certainly not a phrase designed to promote clarity, and its adoption promoted not the clarity claimed by John Gable, but rather ambiguity and conflict.

Examples of what "review and concurrence" meant to the TRA began to appear regularly in the association's minutes starting in the late 1970s, and in them, the phrase is construed ever more expansively. Right away, though, association documents reveal a telling change. In 1978, P. James Roosevelt explained that "...proposals are first submitted for approval" to the TRA; "if approved" they are "forwarded with Association endorsement to the National Park Foundation for final approval." Roosevelt had translated "concurrence" into "approval." By 1989, when Gable described the same process again, the association's role included "accepting, rejecting, or amending the proposals as judged best." By 1998, concurrence had come to mean that funds could be spent "only on *projects or items* approved" by the Association [italics added] – a subtle yet telling expansion of scope that suggested the association was prepared both to exercise line-item control over park projects, and perhaps also to direct spending towards its own priorities for the parks – even as to which park to fund. By 2000, "review and concurrence" included the "right of review or veto"; in fact, Gable now held that it had *always* included this right. The TRA, he explained, had "used a veto over NPS proposals" when withholding its concurrence in the past.[58] At this moment, negotiating

[58] TRA Executive Committee Minutes, July 24, 1978; TRA Executive Committee Minutes, August 22, 1989. In inviting NPF President Rubin to a meeting earlier that month, Gable had written: "We will at that time review and pass on the proposals by the NPS....The recommendations will then be forwarded to your office with our approval, after any changes or amendments are made" (letter, Gable to Rubin, August 2, 1989; SAHI: Central Files, Folder: A 42. *1998*: letter, Gable to Dichtl, August 7, 1998. In the same letter, Gable refers to previous major outlays on the Birthplace, and says "it is

the terms of a new agreement, the association was asserting that "review and concurrence" was, in fact, veto power: if Gable could show that it had always been veto power, and that the NPS had always consented to this, then the TRA would now be asking for nothing more than confirmation of an established privilege.

By 1984, in any event, "review and concurrence" were enshrined in writing. Through a series of incremental changes, the very nature of the park's relationship to the endowment had changed. In 1988, a memorandum from Superintendent Dayson to the regional director described the park's annual funding proposal as a "grant request for additional funds from the Theodore Roosevelt Association and the National Park Foundation." Apparently agency officials no longer regarded the endowment as a public fund: instead, they approached its donor as a grant seeker approaches a foundation. Like grant seekers, the Park Service adopted a deferential tone, as this letter from Regional Director Gerald Patten suggests:

> Dear Dr. Gable:
>
> Our 1989-'90 request for program support from the Theodore Roosevelt Association endowment managed by the National Park Foundation includes the enclosed projects.... Unlike previous years, however, we are taking the liberty of including an additional project, above the $44,000 total of previous years, in case more of the endowment income can be applied to our urgent needs.
>
> The additional project is at Sagamore Hill for security system improvements.... If approved, the North Atlantic Historic Preservation Center will work closely with the Park to design and oversee the improvements.
>
> As always, we appreciate the generous support and guidance of the Theodore Roosevelt Association.
>
> Gerald D. Patten,
> Regional Director[59]

Agency staff signaled their acceptance of the situation in other ways. In 1998, when Gable pledged before the historians assembled at Sagamore Hill to release $200,000 from the endowment, Superintendent Martinez did not challenge his authority to do so; instead, Martinez assured John Dichtl of the Organization of American Historians that he was "equally surprised and pleased by Dr. Gable's kind offer." He was "very grateful to Dr. Gable for taking the initiative of obtaining this approval."[60]

Sagamore Hill's turn for the next major project." *2000*: letters, Gable to Babbitt, August 10, 2000, and Gable to Verone, August 21, 2000; SAHI: Curatorial Files.

[59] Letter, Patten to Gable, August 17, 1989; SAHI: Central Files, Folder: A 42.

[60] Letter, Martinez to Dichtl, November 18, 1998; SAHI: Interpretation Files, Folder: Historians Conference.

Beyond Review and Concurrance

Whatever "review and concurrence" was intended to mean, the Theodore Roosevelt Association used it to wield what was effectively a veto power over endowment funding. By the late 1980s, moreover, the association had gone beyond reviewing agency proposals to directing funds towards its own priorities. Lighting was one. In April 1988, Gable discussed with NPF President John L. Bryant, Jr., the percentage of funds that the foundation "ought to commit to the lighting problem." Afterwards, transmitting the TRA's approval of the park's request for funds for the purpose, he commented that the percentage he had proposed was "in line" with the park's proposal.[61] In 1994, at the association's insistence, the NPS agreed once again to address the house's lighting. Regional staff assumed that the association would take an active role in selecting and directing the consultants chosen to study the problem. It seems that the association was now seen as a co-executant of endowment-supported projects in which it had an interest.

This process could also be seen at the Theodore Roosevelt Birthplace in New York. The agreements of 1984 and 1995-96 had confirmed the TRA's traditional right to free use of the Birthplace for offices, storage, meetings, and special events. Now, Gable told the NPS, "due to leaks from the roof, the Association currently is unable to use the auditorium."[62] In 1989, the association's executive committee reviewed the annual funding proposals for both parks and approved most of them. But after discussing the Birthplace's unsightly condition, it blocked the park's $9,000 request for repairs to the roof and back wall, directing the NPS instead to fund a feasibility study and secure estimates for a far more extensive job.[63] Gable now asked the NPF to "stand ready" for further funding requests for the roof and wall repairs. Next he brought in an architect, Walter Melvin, who recommended a new roof. Finally, the Park Service agreed perform major repairs on the back wall and to put on a new roof, "of the same type and high quality as the original" copper roof of 1923. This work would be supervised by the Park Service, but arranged for and contracted by the TRA under the direction of its architect. It would cost about $147,000, including Melvin's 10% fee. In addition, the NPS would pay for repairs to the auditorium and library. And the agency agreed to do the job before October 27 so that the TRA could hold its annual dinner in the house on Roosevelt's birthday.[64]

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[61] Letter, Gable to John L. Bryant, Jr., August 31, 1988; CRM Division Records, Northeast Region, Regional Curator's Files. Folder: Curatorial, SAHI through 1988.

[62] Memorandum, Gable to Nelms, Lancos, and Dayson, May 16, 1990; NPF Files.

[63] TRA Executive Committee Minutes, August 22, 1989.

[64] Letter, Gable to Rubin, May 17, 1990; NPF Files. The decisions were reached at a meeting with NPS officials at Federal Hall on May 14, 1990, to which Gable brought Melvin, P. James Roosevelt, and

There was little time. Because the Park Service maintained it could not fund the exterior repairs from its own budget, Gable told the agency that "the TRA has decided to ask the National Park Foundation" to cover them. The work could be entirely paid for in a single year by using the "fund of reserve income, plus all income this year, plus $9,000, reserved last year for work at TRB." This would have long-term financial implications, and so Gable informed the NPS:

> We are recommending to the National Park Foundation that no income be made available this year for further projects at either site.... We are also recommending that a portion of the income be reserved for the next several years.... In short, the full income, which has been at about $45,000 per year, will not be spent until the reserve is built back up to some degree.

To compensate Sagamore Hill for the disproportionate spending at the Birthplace, Gable conceded that a "larger portion" of available income might be allocated to Sagamore Hill "for the next few years" – though "precise figures" had not yet been determined. "Please keep this new situation in mind as you plan for the future," he advised the agency.[65]

In presenting this package to the foundation, Gable treated it as a directive from the TRA, and he made the association, in effect, both project client and paymaster. Walter Melvin and the NPS supervisor, he suggested, would approve the bills and then send them to the association, which would then forward them to the foundation with authorization for payment. This change would mean that the Park Service would have no direct contact with the NPF at all: spending requests, funding information, and now also payments would all pass through the TRA. Gable did not forget to instruct the foundation on building up the reserves. He recommended that it give no further money to either site that year, and that "for the next few years we reduce the amount of income available for the two sites."[66]

A revealing shift was taking place in the language of these documents. When writing to the National Park Service, Gable referred to the TRA (or himself) as *we*. But when addressing the National Park Foundation, he referred to the association as *I*: in this context, *we* referred to the Association and the Foundation together. The implication was that spending the endowment's money was the joint responsibility of the association

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Mrs. John E. Roosevelt. As part of the final solution, the NPS declined to fund the salary of its staff supervisor.

[65] Memorandum, Gable to Nelms, Lancos, and Dayson, May 16, 1990; NPF Files.

[66] Letter, Gable to Alan A. Rubin, May 19, 1990; NPF Files.

and the foundation. By contrast, deciding how that money should be spent was the purview of the association, or even of Gable alone.[67]

This habit of speech continued. In 1992, Gable asked Rubin when he thought the endowment would be sufficiently replenished "for us to make some funds available" to the two sites.[68] At this time, Gable was objecting to parts of Sagamore Hill's refurnishing plan, and Gable also asked Rubin to "use your considerable influence" to alter the agency's plan. Noting, finally, that although the proposed changes did not "seem to involve the National Park Foundation, they may down the line," he put Rubin on notice that the TRA would seek to block endowment spending on refurnishing projects it did not like.

Decades after having given it away, the Theodore Roosevelt Association still viewed the endowment as its own. In fact, the level of control it now exercised far exceeded even the most liberal interpretation of review and concurrence. A curious incident occurred in 1998. That summer, Gable conveyed the association's approval of two $2,500 funding requests from the parks to support an exhibition organized by the National Portrait Gallery. Rather than authorizing the foundation to pay the gallery, however, he requested that the check be made out to the TRA, which would then cash it and issue a new check for an identical amount to the museum. Thus the TRA would gain public recognition as donor. The transaction was questionable, yet it went forward. That same day, requesting "documentation that the Roosevelt Association is giving $5,000 to the National Portrait Gallery...," gallery staff assured Gable that the catalog and brochure would credit the donation to the TRA. Gable signed the affidavit, stating, "The Theodore Roosevelt Association is donating $5,000 to the National Portrait Gallery...."

The National Park Foundation

"We don't have a dog in this fight," said an official of the National Park Foundation about the endowment controversy.[69] For the most part, the NPF has had little to say about all of this. Its earliest comment on the subject, preserved in the TRA's minutes of 1973, was ambiguous: the foundation "would like to have the concurrence" of the Association." In practice, the foundation accepted the 1984 arrangement and, at least until 2000, was willing to accommodate the association. An internal document of

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[67] Examples: 1) *we*: "we should spend, on projects at TR Birthplace and Sagamore Hill, total amounts of about $20,000-$25,000 per year"; 2) *I*: "This is my thinking in terms of general policy, but I am not decided on what precisely the amounts allocated for each site should be" (letter, Gable to Rubin, May 19, 1990; NPF Files).

[68] Also: "We might start by making a small amount of income available" (letter, Gable to Rubin, January 3, 1992; NPF Files).

[69] Telephone interview with author, February 27, 2003. The official wished to remain anonymous in view of the sensitive nature of the issues.

1989 notes that endowment spending required "approval to [*sic*] the Theodore Roosevelt Association and the North Atlantic Region of the National Park Service."[70] In 1990, NPF President Rubin assured Gable the foundation was "ready to allocate funds for the repair of the roof and the facade upon request from the Association."[71]

The reasons for the foundation's compliance can be guessed. P. James Roosevelt had been "active" in the foundation's early years, and both he and Gable spoke of the foundation's "close and cordial" relationship with the TRA.[72] In 2000, the Park Service believed it had secured the foundation's support of its position on "review and concurrence"; yet the agency was acutely aware that the foundation "would prefer to avoid antagonizing the TRA...." Conte believed that Theodore Roosevelt, IV, who at that moment was actively representing the association,[73] was a foundation board member. If all of this put the NPS in an uncomfortable position, it also made it difficult for the NPF to maintain its independence. Still, a hard look at the legal authorities for the endowment might have suggested to foundation officials that deference to the association risked compromising the foundation's ability to make good on its responsibilities to the endowment's beneficiary.

The Agreement of 2001

Sagamore Hill's agreement was due to expire on July 12, 2000; that for the Birthplace seven months later. Preparing to negotiate new agreements, Gable took the TRA's treasurer, Brian Madden, down to Washington early in 1999 to meet with his counterpart at the National Park Foundation, controller Megan Brand. They wanted to know how large the endowment was.[74]

The answer was arresting: the TRA's initial contribution had grown to $2,066,735. Behind this fact lay an interesting story. Since spending large sums on the Birthplace in 1990, the association had authorized no major expenditures: indeed the parks were told that none would be approved. The principal grew. At the end of June 1995, it stood at a little over $1.1 million, plus about $114,000 in accumulated interest. At this point, the NPF's auditors had decided to reduce the principal account to $500,000 – the level at which it had been established in 1963 – and to shift the balance into the income account. As the foundation moved assets out of the principal account and then

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[70] "Theodore Roosevelt Birthplace and Sagamore Hill Fund - Income Restricted Fund," June 29, 1989; NPF Files.

[71] Letter, Rubin to Gable, May 31, 1990; NPF Files.

[72] TRA Executive Committee Minutes, July 24, 1978, and August 22, 1989.

[73] E-mail, Conte to Molly Ross and Renee Stone; NPS Solicitors Headquarters, November 1, 2000; SAHI: Curatorial Files.

[74] Letter, Megan Brand to Brian Madden, January 21, 1999; NPF Files.

held its face value constant after 1995, the income account climbed skyward. By June 1997, it had grown to $1.15 million; by the end of calendar year 1998, to almost $1.57 million. A year later, the endowment's total value stood at over $2 million.[75] Of this, the $500,000 principal could not be touched, but all of the annual interest from both the principal and the income accounts was available for spending, and in Fiscal Year 1997 this amounted to more than $250,000. Actually, as Brand pointed out, the *entire* income account – all $1.57 million – could be spent. "Unless," that is, "the NPS and the Theodore Roosevelt Association choose to increase the endowment...."[76] – by which she meant, shift money back into the principal account.

That is exactly what the TRA chose to do. The association wished to safeguard and increase the endowment and so, to "build up the income account,"[77] it had kept a tight rein on spending. During a five-year period (1992-97) in which the endowment's value had grown by $664,755, the foundation's accounts recorded no more than $29,720 in spending on the parks.[78] This was a small fraction of what a prudently managed foundation with comparable assets would have given out in the same period. But the unspent gains were not going into the endowment's corpus: they were piling up in the income account. In October 1999, Executive Director Gable asked the NPF to transfer $1 million into the principal account, which would bring it to $1.5 million. At Gable's urging, the superintendents endorsed the move, which was formally made in January 2000.[79]

Shifting the money would protect the fund's corpus, an essential condition for the future. The Park Service, however, was troubled by the TRA's unwillingness to authorize grant spending. Early in 2000, the agency had reached agreement with the association on a badly needed $200,000 disbursement for Old Orchard Museum. It was with this in mind that Michael Adlerstein urged, a few months later, that the agency's

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[75] According to memorandum, Hedrick Belin (NPF) to Martinez, John Avery, and John Gables [*sic*], January 4, 2000, which states a figure of $2.268 million; SAHI: Curatorial Files.

[76] All figures up to and including FY 1997; NPF. Funds Management Examples: Theodore Roosevelt Association," n.d. [between June 1997 and June 1998]. 1998 data: letter, Brand to Madden, January 21, 1999; all NPF Files.

[77] Letter, Gable to Dichtl, September 7, 1998; SAHI: Interpretation Files, Folder: Historians Conference.

[78] The five-year period was July 1992, to June 1997. "NPF Funds Management Examples. Theodore Roosevelt Association," n.d. [between June 1997 and June 1998]. NPS figures confirm this. A few years later, with the endowment standing at over $2 million, NPS Regional Solicitor Conte could complain that over the nine years since 1991 the two parks together had received no more than "approximately $30,000." E-mail, Conte to Molly Ross and Renee Stone (SOLHQ), November 1, 2000; SAHI: Curatorial Files.

[79] Letters, Gable to Claudia P. Schechter (NPF), October 27, 1999; Gable to Martinez, November 2, 1999; Martinez to Schechter, January 14, 2000; Belin to Madden, March 1, 2000; all SAHI: Curatorial Files.

"main goal" should be ensure "they don't continue to sit on the funds." Others shared his concern. Superintendent Martinez wished the newly enlarged principal account could be cut back to $1 million, releasing (at least theoretically) more money for spending.[80] It was easy to see what was at stake. A page of notes in Curator Amy Verone's handwriting, apparently from 2000, records her calculation that the endowment could be producing as much as $110,000 each year in spendable interest – that is, in project funding. The redefined principal account alone could generate as much as $75,000 annually.[81] And that was quite apart from extraordinary one-time expenditures such as that proposed for Old Orchard. Calculations like Verone's suggested that Sagamore Hill alone might reasonably expect to receive more *each year* than both parks together had received over the last nine years.

A comparison with the TRA's management of its own endowment is instructive. At this time, the association's net assets stood at just under $2 million, of which $1,664,141 was held in securities. Not accounting for inflation, the endowment had increased in value by about a third over the $1.2 million it had retained from the 1963 donation. By contrast, the NPF's half-million-dollar fund had more than quadrupled. Evidently the restraint enforced by the association had helped promote the growth of the foundation's endowment. Still, there was another way to look at it. During fiscal year 2000, the TRA reported a total of $228,776 in interest, dividends, and capital gains from its securities. Of this, it had spent $74,044, resulting in a net gain for the year of $154,732. The $74,044 which it had spent amounted to somewhat more than four percent of its investments at the year's beginning. It was also very close to the lower limit of what Curator Verone had estimated the park's larger endowment fund was capable of producing. Evidently the association was living by a different fiscal standard than the one it enforced on the foundation.[82]

How much of the endowment fund to spend and how much to retain were important questions. Gable and Madden had another one for Megan Brand: Could the TRA draw upon the endowment to cover its own "operating expenses"?[83] Brand said no.

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[80] E-mails, Adlerstein to Conte, August 24, 2000, and Adlerstein to Conte and Martinez, July 20, 2000; SAHI: Curatorial Files.

[81] *Notes*: SAHI Curatorial Files. The calculation is based on the 2000 endowment figure ($2.268 million) stated in memorandum, Belin to Martinez, Avery, and Gables [*sic*], January 4, 2000.

[82] TRA, "Return of Organization Exempt From Income Tax" (IRS Form 990) for year ending June 30, 2000 (information publicly available at www.guidestar.org, the website of GuideStar, the operating name of Philanthropic Research, Inc.) Net assets on July 1, 1999 were $1,831,354; on June 30, 2000, $1,973,949. Total revenue for the year was $597,091. Total expenses were $454,496.

[83] Letter, Megan Brand to Brian Madden, January 21, 1999; NPF Files.

The enabling legislation prohibited it; besides, she pointed out, the government was already giving the association free "meeting rooms, facilities and storage space."[84]

In January 2000, the NPF's Hedrick Belin convened representatives of the Theodore Roosevelt Association and Sagamore Hill NHS to consider the question of the endowment's administration. Afterwards, he circulated a draft reflecting their consensus. It differed in three important ways from the agreements of 1984 and 1995, as follows:

1. It covered the entire subject of the fund's management, rather than simply the handling of grants. Provisions confirming the new $1.5 million principal figure, establishing an emergency reserve, and setting annual spending at 5% of the endowment's market value were all new.
2. It outlined the grant process itself in much greater detail than previous agreements.
3. It proposed annual stipends to be awarded automatically to each park: the superintendents could use them "for the highest priority needs." It also proposed an annual $5,000 grant to the association, "to cover some of the administrative time and costs associated with its work at the two sites."[85]

The annual grant to the TRA was hard to explain. The foundation's controller had already told Gable and Madden it could not be done. Perhaps the stipulation that it be used to cover expenses "at the two sites" was intended to meet the legal requirements. Yet it remains difficult to justify. If the money covered operating expenses, it might be illegal. If it went for programmatic expenses, it would deprive park management of an important dimension of authority over activities at the park. If it were considered a financial management fee, it would be unnecessary, since the funds were managed by the NPF, not the TRA, and the foundation already charged an annual management fee on the order of $30,000 per year – whether or not funds were spent.[86] Finally, the

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[84] Letter, Brand to Madden, January 21, 1999; NPF Files.

[85] Draft Memorandum of Understanding, untitled, February 1, 2000, circulated with cover letter from Hedrick Belin, January 31, 2000. Belin's invitation to meet: memorandum, Belin to Martinez, John Avery, and John Gables [*sic*], January 4, 2000. Meeting participants: Memorandum, Verone to Assistant Regional Director for Entrepreneurial Development, NE Region, April 14, 2000; all: SAHI Curatorial Files.

[86] As of 1989, the fee was calculated as follows: 2% of the fund balance up to $500,000, plus 1.5% of the balance between $500,000 and $1,000,000, plus 1% of the balance above $1,000,000. Applied to a fund balance of about $2.2 million, this formula yields a fee of $29,500; Financial statement for endowment fund, June 22, 1989: NPF. The foundation's records are imperfect, but information supplied by telephone (February 2004) suggests that actual fees charged were consistent with the formula.

association did not really need the income: in fiscal year 2000, it ran a surplus of $154,732.[87]

What happened next represents the divergence of views that increasingly characterized the negotiations. The TRA's executive committee approved Belin's draft agreement, setting the parks' annual stipends at $10,000 each.[88] Meanwhile, the park submitted the draft to Northeast Region Solicitor Anthony Conte, whose opinion was anything but approving.[89]

To Conte, the proposed TRA stipend was simply "inappropriate." More importantly, his analysis rejected decades of practice with regard to the endowment. "Nothing in the Act," he wrote, "provides that the TRA should have any control over the said funds after the same were donated" to the National Park Trust Fund Board. "Once a donation is made," Conte explained, "the donor loses control" over its future use unless a specific provision has been made to the contrary. There was no evidence of such a provision: in its absence, there was "no legal obligation for the NPF to consult with the TRA" about the funds. While it might do so for "public relations," it must always place its "fiduciary obligation" to the National Park Service first.[90] Whatever claims previous agreements had made, "review and concurrence" was not – and never had been – in accordance with the park's establishing legislation. Put simply, the TRA had "no role in the management of the endowment."[91]

Conte shared his conclusions with the Theodore Roosevelt Association,[92] which responded much as it had to earlier challenges. Gable talked to Theodore Roosevelt, IV,

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[87] TRA, "Return of Organization Exempt from Income Tax" (IRS Form 990) for year ending June 30, 2000.

[88] Letter, Gable to Hendrick [*sic*] Belin, March 10, 2000; SAHI: Curatorial Files.

[89] Curator Verone believed the document was merely a discussion draft and that the TRA's approval was premature. Memorandum, Verone to Assistant Regional Director for Entrepreneurial Development, NE Region, April 14, 2000; SAHI: Curatorial Files.

[90] Memorandum, Regional Solicitor, NE Region, Anthony R. Conte, to SAHI Superintendent, n.d. [received April 1, 2000]; SAHI: Curatorial Files.

[91] Statement of Anthony Conte, contained in [Diane Dayson], "Sagamore Hill National Historic Site, Briefing Report," July 6, 2000; Harpers Ferry Center, SAHI Box: Misc. Conte discussed the issue in more detail, opining that, in light of the enabling legislation, endowment funds could be spent on commemorative events or TRA administrative expenses "if such expenditures are directly associated with one of the two Roosevelt sites." However, he also questioned the TRA's role in "depositing the $10,000 annual stipend to each site unless said funds are to come from the TRA rather than the NPF endowment fund" (memorandum, Regional Solicitor, NE Region, Anthony R. Conte, to SAHI Superintendent, n.d. [received April 1, 2000]; SAHI: Curatorial Files. For Conte's analysis of the enabling legislation, see also e-mail, Conte to Adlerstein, Ross, and Stone, November 1, 2000; SAHI: Curatorial Files.

[92] Letter, Conte to Lawrence Budner [TRA President], May 31, 2000; SAHI: Curatorial Files. Conte proposed that, since it would be unfair to expect the TRA to incur costs or overhead expenses for which it could not legally be reimbursed, the old system of setting up donation accounts at each

who complained to Interior Secretary Bruce Babbitt. Once again, NPS staff found themselves preparing briefing papers.[93] But this time the association was less successful. Months later, Gable complained to Babbitt that, despite Roosevelt's involvement, negotiations had still not produced an agreement acceptable to the association.[94]

Meanwhile, the Park Service had brought in Northeast Associate Regional Director Michael Adlerstein to work on the problem. Adlerstein was based in New York; his portfolio involved negotiating with the private sector. Memoranda and e-mails reveal that Adlerstein now took the lead in crafting an agreement, while Regional Director Marie Rust negotiated directly with Roosevelt. Conte continued to provide legal and strategic counsel and, at the end of the process, would take on direct negotiating responsibility. The park superintendents reviewed and commented on drafts.

On July 20, Adlerstein sent Conte a new draft.[95] Bolstered by Conte's legal analysis, it replaced "review and concurrence" with "review, consultation and coordination," which implied no formal decision-making role. In other ways, it was conciliatory. It gave the TRA an "opportunity to recommend changes or substitutions to the project list," and provided the $5,000 association stipend (now tagged for "administrative costs"[96]) – even while canceling the proposed stipends to the parks. Adlerstein's view was that the TRA stipend was unnecessary, but that it would be an "overreach" not to give the Association this "token."[97]

The TRA, however, was now asking for new benefits: an agreement in perpetuity and free admission for TRA members, Friends of Sagamore Hill, "and their guests." These requests were difficult to grant. While the NPS was prepared to offer a long-term (though not perpetual) agreement, free admission was more problematic. In practice, both the association and the Friends were already taking advantage of the privilege – indeed they were using it to "promote recruitment for their membership" – and it was becoming a financial and management problem for Superintendent Martinez. It was not simply the lost revenue that worried him. As Rust explained to Roosevelt, the Fee

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park should be revived. The parks could then manage the funds "without the incurrence of overhead costs by the TRA."

[93] [Diane Dayson], "Briefing Statement," July 6, 2000; SAHI: Curatorial Files. According to the statement, another briefing paper was prepared by Michael Adlerstein for Regional Director Marie Rust, in order to respond to Roosevelt's complaint.

[94] Letter, Gable to Babbitt, August 10, 2000; SAHI: Curatorial Files.

[95] Draft "General Agreement Between the National Park Service, the Theodore Roosevelt Association, and the National Park Foundation," [n.d., annotated by Conte and attached to e-mail, Adlerstein to Conte and Martinez, July 20, 2000], Section B. 2-3; SAHI: Curatorial Files.

[96] Draft "General Agreement," 2000, Section B. 4.

[97] E-mail, Adlerstein to Conte and Martinez, July 20, 2000; SAHI: Curatorial Files.

Demonstration Program, under which Sagamore Hill's entrance fee was authorized, did not allow the park to waive fees: doing so could jeopardize the park's participation in the program. And it was the Fee Demonstration Program that allowed the park to keep 80% of its admission revenues – a revenue stream far larger than what it derived from the Friends of Sagamore Hill, or for that matter from the endowment.[98] "We are dependent on the income of these funds for our backlog maintenance program," as Martinez reminded Adlerstein.

On August 7, Regional Director Marie Rust presented a new draft to Gable.[99] At Conte's urging, the language had been tightened up. The annual stipend to the TRA was replaced with reimbursement "up to $5,000" for expenses incurred in "providing assistance" to the NPS at the parks.[100] And the association's role in endowment spending was downgraded another notch to providing "review and advice." The association could still "recommend changes or substitutions," but the final decision would be "within the sole discretion of the National Park Service."[101]

The Park Service included another new clause that was bound to create controversy: a requirement that the Theodore Roosevelt Association and the National Park Foundation must obtain prior approval from the NPS for "any public information releases which refer to the Department of the Interior, any bureau, park unit, or employee...or to this agreement."[102] Given the TRA's mission to interpret the legacy of Theodore Roosevelt – a central figure in the history of the Interior Department and the national parks – it is hard to see how the association could have accepted this provision and, in fact, Gable rejected it instantly. But the censorship clause was far from the only obstacle. Reminding Marie Rust that the association had "always had review or veto power," he argued that placing the final decision within the agency's discretion "fundamentally changes the relationship" among the three groups. He would not sign the new agreement.[103] He appealed once more to Secretary Babbitt.

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[98] "...and their guests": e-mail, Adlerstein to Conte and Martinez, July 20, 2000; *Rust*: letter, Rust to John Gabel [*sic*], nd (draft?); *Martinez*: e-mail, Martinez to Conte and Adlerstein, July 21, 2000; all: SAHI Curatorial Files.

[99] Letter, Rust to Gabel [*sic*], n.d., (draft?). See also Rust to Gable, August 7, 2000; SAHI: Curatorial Files.

[100] For internal discussion of the stipend see e-mails, Martinez to Conte and Adlerstein, July 21, 2000; Adlerstein to Conte, July 26, 2000; and Adlerstein to Rust, Martinez, et al, July 27, 2000; all SAHI: Curatorial Files.

[101] [Draft] "General Agreement Between the National Park Service, the Theodore Roosevelt Association, and the National Park Foundation," [n.d., but signature lines dated August 1, 2000], Article II.B.2; SAHI: Curatorial Files.

[102] "General Agreement" (August draft), Article IX.4.

[103] Letter, Gable to Rust, August 8, 2000; SAHI: Curatorial Files.

Now and later, Gable leveled two charges at the proposed new agreement.[104] First, it was a "radical change" to existing policies. Second (as he told Babbitt), it was an attempt to "gain total control over the endowment." On these points the agency might well have agreed. In fact, Conte had long ago alerted the TRA to the "major change" foreshadowed by his legal analysis.[105] And, he advised Adlerstein, it was "important that the National Park Service seek to establish its supremacy in the relationship between the parties which has apparently not been clearly established in the past."[106] But while agreeing on the magnitude of the changes, the two parties interpreted them very differently. Gable termed them "unwise," their justification "entirely unclear."[107] Conte pointed out that existing practices were "based on an incorrect understanding of the relationship."[108] His argument, in truth, was clear enough. Where Gable pointed to tradition, the National Park Service countered with law.

Further revisions and discussions changed little. Later, Gable would describe the Park Service as "unbending in its efforts to eliminate the Theodore Roosevelt Association's traditional function of 'review and concurrence.'"[109] For its part, the association was unyielding in defense of its privileges. In fact, Gable chose this moment to introduce a new demand: that the $5,000 ceiling on annual reimbursements be adjusted to rise annually with inflation.[110]

Describing the conflict, Gable used images of all-out war. The agency's position, he informed his trustees, was based on nothing more than "greed and a drive for absolute power." Its stand on review and concurrence was simply an attempt to "clear the decks for the final assault" on the TRA. Gable advised his board that the way to win was to produce a counter-proposal and "fight for it all down the line."[111] He now

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[104] Letters, Gable to Rust, August 7, 2000, and Gable to Babbitt, August 10, 2000. See also Gable to Rust, September 7, 2000; SAHI: Curatorial Files.

[105] Letter, Conte to Budner, May 31, 2000; SAHI: Curatorial Files.

[106] E-mail, Conte to Adlerstein, Martinez, and Avery, July 20, 2000; SAHI: Curatorial Files. Conte's comment is in explanation of the changes he suggests to Adlerstein's first draft, which Adlerstein had sent with the explanatory comment, "nps [*sic*] controls the endowment, tra [*sic*] has a consultive relationship [*sic*]" (e-mail, Adlerstein to Conte and Martinez, July 20, 2000; SAHI: Curatorial Files).

[107] Memorandum, Gable to Rust and Adlerstein, November 27, 2000; NPF Files.

[108] Gable to Rust, September 7, 2000; Conte to Budner, May 31, 2000.

[109] Memorandum, Gable to Rust and Adlerstein, November 27, 2000; NPF Files.

[110] Gable to Rust, September 7, 2000. Gable also objected to the censorship clause that the NPS had introduced in the August draft, pointing out that it infringed on the TRA's freedom of speech. The documents provide no justification for it, nor was it further discussed.

[111] Memorandum, Gable to Theodore Roosevelt, IV, Judge Kupferman, Brian H. Madden, September 9, 2000 (document from TRA Files provided to the author by John Gable; copy in SAHI: Curatorial Files).

produced such a proposal.[112] It essentially reverted to the agreements of 1984 and 1995-96, guaranteeing the association's traditional prerogatives of free space and facilities, reinstating "review and concurrence," and – apparently as a sweetener – holding out the possibility of an "annual donation" to the park. "I leave it to you," Conte advised Regional Director Rust, "to determine whether this is a sincere offer or not...."[113] In fact, it was hardly an offer at all: the TRA agreed only that "consideration will be given" to helping; assistance might or might not take the form of a cash donation; and any donation it chose to make could be directed, at its discretion, either to the park or to the Friends of Sagamore Hill.[114]

This highly conditional offer of financial support was accompanied by very definite new demands. The TRA's proposal removed the cap on reimbursable expenses,[115] and defined them so generously that, as Conte pointed out, the park might find itself paying the fundraising expenses of a private association established to support the park – a highly unusual situation at best.[116]

A cautionary example of what might happen under this arrangement was actually taking place at the time. Appealing for Babbitt's intervention a month earlier, Gable had appended an ingratiating, hand-written footnote: "On Sunday we are holding our fourth annual benefit for Sagamore Hill, even though our cooperative agreement has expired."[117] In fact, the TRA itself had never held a benefit for the park, nor was it holding this one: the reference was to the Friends of Sagamore Hill, the local group it had recently absorbed as a chapter. And judging from previous years, the park stood to gain less from the Friends' efforts than it might find itself paying to the association under the proposed agreement.[118]

As for endowment spending, Gable proposed not only to reinstate "review and concurrence," but also to extend association control far beyond earlier agreements. By simultaneously capping annual grant spending at 5% of earnings and requiring the NPF to realize annual yields greater than that, it effectively created a reserve fund under TRA

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[112] [Draft] "Memorandum of Agreement Between the National Park Service, Sagamore Hill National Historic Site, and the Theodore Roosevelt Association" [n.d.], with cover letter, Gable to Rust, September 8, 2000; SAHI: Curatorial Files.

[113] E-mail, Conte to Rust, September 18, 2000; SAHI: Curatorial Files.

[114] [Draft] "Memorandum of Agreement," Article I.a.

[115] [Draft] "Memorandum of Agreement," Article II. h. The draft did make reimbursement requests "subject to the review and concurrence" of the NPS and NPF, but it did not require approval to be sought beforehand.

[116] E-mail, Conte to Rust, September 18, 2000; SAHI: Curatorial Files.

[117] Letter, Gable to Babbitt, August 10, 2000; SAHI: Curatorial Files.

[118] For the Friends' fundraising efforts, see Chapter 4.

control. It even attempted to dictate internal NPS procedures, such as how the agency resolved disagreements between the parks over funding proposals.

There was something unrealistic about all of this. Why would the National Park Service accept a proposal that flouted its legal analysis, subjected the endowment to strictures tighter than those it had rejected, and demanded new favors? It would have been difficult, in fact, to execute the proposed agreement. Though the National Park Foundation was not a signatory, the agreement bound it to a host of detailed conditions that were probably not enforceable and that, if enforced, could have interfered with the foundation's fiduciary obligation to the Park Service.

In October came a revised draft from the TRA.[119] In place of "review and concurrence," it proposed to make endowment spending flatly "subject to the approval of the Association," a change which in Conte's view simply made "even more explicit...the principal point of contention." The new draft also sought to extend association control over the endowment principal, making both the definition of the corpus and the calculation of annual income "subject to the agreement and concurrence" of all three groups. While this might look like a concession to the NPS, Conte pointed out that it would effectively give the association "veto power" over the most basic financial decisions regarding the endowment, and would lead to "the same type of inaction that the National Park Service has suffered for many years" – the refusal to spend funds that Adlerstein deplored. He advised against approval.[120]

Well before the October draft was presented, the Theodore Roosevelt Association and National Park Service had agreed to meet in a negotiating session in November. Events now began to flow toward this meeting. "The question," Conte asked Adlerstein and Rust, "is whether the National Park Foundation will back up the National Park Service, and whether you want to stand firm and resist his [Gable's] demands."[121] Conte emphasized the importance of establishing "high level contact" with the foundation before meeting with the association because, as he put it, "if the National Park Foundation refuses to stand by the National Park Service, then there is little reason to continue pressing the point...."[122] By November 1, he was able to report to the agency's solicitor in Washington that "NPF has agreed to support the NPS position."[123]

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[119] [Draft] "Memorandum of Agreement Between the National Park Service, Sagamore Hill National Historic Site, and the Theodore Roosevelt Association," [n.d.]; SAHI: Curatorial Files.

[120] *Agreement*: [Draft] "Memorandum of Agreement," Article II. h. *Conte's comments*: e-mail, Conte to Rust and Adlerstein, October 16, 2000; SAHI: Curatorial Files.

[121] E-mail, Conte to Adlerstein, Rust, and others, September 7, 2000; SAHI: Curatorial Files.

[122] E-mail, Conte to Rust and Adlerstein, October 16, 2000; SAHI: Curatorial Files.

[123] E-mail, Conte to Adlerstein, Molly Ross, and Renee Stone (both SOLHQ), November 1, 2000; SAHI: Curatorial Files. Conte's e-mail was written at the request of the NPS to secure Washington concurrence of the position before the meeting, and was motivated by the fact that it "could prove to

It seemed as if success was at hand, and at the meeting on November 21, the agency played what Gable called its "trump card": it announced the NPF's support for its position.[124]

The foundation itself was not represented at the meeting. Conte believed this was because it "would prefer to avoid antagonizing the TRA since Mr. Roosevelt is a member of the NPF Board."[125] Roosevelt himself was present, but was representing the TRA. He was a key figure, and the Park Service had closely tracked his evolving views. At the beginning of November, according to Conte, Roosevelt believed the "NPS is correct."[126] Shortly before the meeting, Adlerstein thought Roosevelt might take the association's side.[127] The day afterwards, Conte noted: "TR IV agreed TRA has weak claim to veto rts [sic] but others refused to 'give up' rights – distrust NPS, but offered no basis for claim of veto right other than past practice."[128] Finally, on January 4, Marie Rust told Conte, "TR IV thinks our position is weak – because of prior agreements."[129]

What prompted this shift is unclear, but it may have been a December meeting at which Gable had given Roosevelt what he called "documentary proof" that "review and concurrence" had been in place since 1973.[130] If so, Gable's claim, while technically accurate, was quite carefully drawn. His letters and memoranda to Roosevelt did not mention the tumultuous events of 1972-73 that had preceded the system's adoption, nor did they point out that review and concurrence had *not* been in place prior to those events. The implication of Gable's statements to Roosevelt and to others during this period was that nothing at all was known about the endowment's first decade. One was free to infer that the unknown past was likely to have been very similar to the known past.

During the negotiations, neither Gable nor the Park Service ever evinced much curiosity about conditions before 1973. For the NPS, the loss of institutional memory may have been a critical factor: since 1973, at least seven site managers had come and gone at Sagamore Hill, the region and the New York City group of sites had undergone

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be controversial with an influential group." The e-mail provided a full statement of Conte's legal analysis. There is no documentation of Washington's response, but the tenor of the meeting on November 21 suggests that its support was given.

[124] Letter, Gable to Belin (NPF), November 26, 2000.

[125] E-mail, Conte to Adlerstein, Ross, and Stone, November 1, 2000; SAHI: Curatorial Files.

[126] E-mail, Conte to Adlerstein, Ross, and Stone, November 1, 2000.

[127] E-mail, Adlerstein to Conte, November 17, 2000; SAHI: Curatorial Files.

[128] Hand-written note, November 22, 2000; SAHI: Curatorial Files.

[129] Hand-written note in Conte's handwriting, January 4, 2001; SAHI: Curatorial Files.

[130] Letter, Gable to Roosevelt, December 14, 2000; NPF Files. See also Gable to Roosevelt, August 20, 2000; SAHI: Curatorial Files.

repeated reorganizations, the relevant files were scattered among curatorial and management departments, regional offices, and archives. There was no one who remembered the park before the crises of 1973, and no easy way to retrieve the information. Gable's situation was different. A historian, he had great esteem for institutional memory: indeed, that was one reason he had supported the Cooperative Agreement of 1984. Appointed director in 1974, he had arrived in the wake of the upheavals of 1973, and must have been surrounded by trustees and staff eager to ensure that he understood the import of those events. By 2000, to be sure, all of this lay more than 25 years in the past: perhaps memory had faded. At any event, while Gable frequently claimed that the system of TRA review had been in place when he arrived, or that it could be traced as far back as 1973, he was content to leave its origins and antecedents unexamined.[131]

After the meeting, Gable played his own high card. If the National Park Service would not sign an acceptable agreement, the TRA was prepared to block "any sum to be paid by the National Park Foundation to the National Park Service for any purpose."[132] The agency had a choice, he said: it might sign the TRA's October draft or renew the agreements of 1995-96.[133] This was a well-timed threat, but also a perplexing one. The exhibits at Old Orchard, installed in 1964, had grown shabby and embarrassing: replacing them had long been a priority of the TRA, and of Gable himself, and a plan to do so was finally moving forward. Yet now, Gable was holding the park's most pressing needs hostage to the association's dissatisfaction with the cooperative agreement. Of course, had the NPF strongly supported the agency's position, the threat would have rung hollow. Gable knew this: before issuing it, he asked Hedrick Belin whether the foundation agreed with the NPS.[134] We do not know what Belin said, but his answer did not dissuade Gable. Evidently the foundation's support for the agency was less than wholehearted.

The park was hungry for funds. Its position began to soften. Before the November meeting, Adlerstein and Rust had agreed that, if the TRA remained inflexible on endowment review, the Park Service would "probably back off." In exchange, they

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[131] "At least since 1973": Memorandum, Gable to Theodore Roosevelt, IV, Judge Kupferman, Brian H. Madden, September 9, 2000 (document provided to author by John Gable). See also Gable, recorded interview with author, August 12, 2004 (recording at Sagamore Hill).

[132] Letter, Gable to Rust, December 28, 2000; NPF Files.

[133] Gable to Belin, November 28, 2000. See also Gable to Belin, December 29, 2000; NPF Files. Not having reached an agreement, the TRA trustees "believe that it would be completely inappropriate for the National Park Foundation to make any grant" to either park until the issue is resolved. Sagamore Hill had "monetary needs....We have given National Park Service the option of renewing or extending the Cooperative Agreements" of 1995/96 for one or two years. Failing this, the Association would be "unable to concur in any grant" for Sagamore Hill.

[134] Letter, Gable to Belin, November 26, 2000.

would "offer a shorter term agreement, maybe 5 years."[135] All through December and into January, the association continued to exert pressure. On January 4, Marie Rust telephoned Solicitor Conte: "wants to continue Interim Agree for 2 yrs," he noted: "...cooling off period."[136] The association still hoped for a long-term agreement, but settled for this offer. The Park Service, meanwhile, found that it needed not $200,000 but $300,000 for Old Orchard. It settled for $250,000.[137]

On January 26, 2001, Superintendent Lorenza Fong – freshly arrived at Sagamore Hill the previous month – signed the new agreement. It was a renewal of the 1995 document.[138] The next day, in what was clearly a *quid pro quo*, the TRA's executive committee endorsed the park's funding request. The association still firmly held the endowment's purse strings. And it was prepared to put politics above merit, need, or even fiscal prudence in managing them.

An Unfinished Story

Gable's high card had trumped that of the Park Service, at least for the moment. The agreements of 1995-96 had been extended for a further two years, the old prerogatives sustained. But in the longer term, the question of control over the endowment had been placed on a new footing. The NPS had for the first time examined a long-standing tradition under the clear light of the law. Contrary to the 1984 agreement's claim, Conte pointed out that the enabling legislation created no obligation to involve the TRA in managing the endowment.[139] Whatever the agreement might say, review and concurrence were not in accordance with the Act.

One small detail of the negotiations may symbolize the entire conflict. The agreements of 1984 and 1995-96 stated that the National Park Trust Fund Board had "accepted $500,000" from the association. That was true. In 2000, the National Park Service proposed to amend this to state that Board had "accepted *an unrestricted gift* of

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[135] E-mail, Adlerstein to Conte, November 17, 2000.

[136] Handwritten note in Conte's hand; SAHI: Curatorial Files.

[137] For the final phases of the negotiation, in addition to the sources cited, see letter, Gable to Rust, December 28, 2000, and handwritten notes of Anthony Conte, January 4 and 8, 2001; SAHI: Curatorial Files.

[138] Memorandum of Agreement Between the National Park Service, Sagamore Hill National Historic Site, and the Theodore Roosevelt Association, January 12, 2001, and Memorandum of Agreement Between the National Park Service Manhattan Sites, Theodore Roosevelt Birthplace National Historic Site and the Theodore Roosevelt Association, 11 January, 2001. The agreements were signed respectively by Superintendents Lorenza Fong and Joseph T. Avery for the NPS and John Gable for the TRA.

[139] E-mail, Conte to Adlerstein, Ross, and Stone, November 1, 2000.

$500,000."[140] That was also true – arguably truer. Yet the association struck out the words: a gift given without restrictions would not support the TRA's claim to review endowment spending, much less its claim to veto power.

As of this writing, the agreements of 2001 have been renewed for a full five-year term. So the "urgent issue" to which the NPS's visiting management team had drawn attention a year earlier has apparently been resolved. To John Gable, the new agreement represented a triumph of diplomacy; relations between the parties, he said in 2004, have never been better.[141] That is in part because the park has been committed to restoring and nurturing a collegial relationship. Yet in a few years, the parties will return to the bargaining table and confront once again the old question. Should they wish to, they will now be able to consider the endowment question not merely in the light of tradition, but also of history and law.

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[140] [Draft] "General Agreement Between the National Park Service, The Theodore Roosevelt Association, and the National Park Foundation," annotated draft attached to e-mail from Tony Conte to Mike Adlerstein et. al., July 20, 2000; SAHI: Curatorial Files.

[141] John Gable, recorded interview with author, August 12, 2004 (recording at Sagamore Hill).

`CHAPTER 6

CURATING, INTERPRETING, AND LANDSCAPING SAGAMORE HILL: NEW DIRECTIONS, 1991-2000

PREFACE: 1991

The 1990s saw a spate of large-scale initiatives that would reshape the Theodore Roosevelt House's interiors, alter long-established patterns of public visitation, renew the park's interpretive presentation, and reevaluate its historic landscape. The substantial changes that now took place could be traced to the confluence of several factors. One was new leadership at the park. Vidal Martinez took over as superintendent at the end of 1990. Within a few months, Amy Verone arrived as curator, and Roger Johnson came as Maintenance Supervisor (he would later become Chief of Maintenance). When Martinez left the park in 2000, he had become its longest-serving superintendent. Johnson retired in 2004. Verone continues to serve. The three made a strong management team, whose longevity helped the park to stay focused on projects that could take many years to complete.

Superintendent Martinez threw himself into his new assignment. It became more than a job. "I loved that place," he recalled some years after leaving Sagamore Hill.[1] Verone, too, was a good fit for Sagamore Hill's challenges. "She turned that whole museum services department around completely," notes Martinez, and she also had a "deep appreciation" of the need for a landscape management plan.[2]

Beyond new leadership at the park, another factor in Sagamore Hill's dramatic changes was the impact of external mandates and programs. Martinez arrived at Sagamore Hill with a promise to do something about its historic landscape, but it was the establishment of the North Atlantic Region's Cultural Landscape Program earlier that year and of its Olmsted Center for Landscape Preservation the following year, that allowed him to make good on that promise.

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[1] Vidal Martinez, recorded interview with author, January 14, 2005.

[2] Vidal Martinez, recorded interview with author, January 14, 2005.

Other mandates and programs had been put in place well before 1990, and in this sense the park's new leaders were lucky: initiatives begun many years earlier bore fruit under their watch. Nowhere was this truer than inside the Theodore Roosevelt House. To call the refurnishing of the house – launched in 1986 – the park's "most important collections project"[3] was to understate its significance. It was a massive undertaking, involving the rearrangement of furnishings in all 27 period rooms. It required coordinated campaigns of research, cataloging, conservation, and acquisition, and it focused resources from all areas of park management over a period of several years. Beyond the collections themselves, the refurnishing project triggered investments in architectural rehabilitation and security, as well as new efforts to solve the house's persistent climate problems and improve its lighting. It affected the house's interpretation in ways both direct and indirect: direct by altering key aspects of the TRA's legacy, indirect by forcing far-reaching changes in visitor services. In many ways the refurnishing project was like a whip that, shaken at one end, transmitted ripples to the farthest reaches of the park. The first shakes of that whip had been administered about 1980; energy was added by museum initiatives in Washington and in the regional office, and by the scholars and museum planners who researched and wrote the refurnishing plan at the agency's Harpers Ferry Center. The ripples became visible after 1990 as park and regional staff prepared to carry out its recommendations.

CURATING AND PRESERVING THE THEODORE ROOSEVELT HOUSE

It was during the late 1970s that curator Gary Roth took the first steps towards improving the historical accuracy of the house's furnishings. He had been investigating the preservation of Sagamore Hill since 1975, and would complete his Master's thesis – *The Roosevelt Memorial Association and the Preservation of Sagamore Hill, 1919-1953* – two years later.[4] He knew as much as anyone within the NPS about the state of the house's interiors, which had last been restored in 1953. And he was in a good position to advocate for changes, since he had developed warm relationships with the Roosevelt family and the Theodore Roosevelt Association while doing his research. Indeed, John Gable took credit for ensuring that Roth was hired by the park.[5] In 1978, therefore, when Roth presented Sagamore Hill's $25,000 endowment funding request – of which $17,500 was earmarked for restoring Mrs. Roosevelt's drawing room – he was cordially

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[3] Chief of Visitor Services and Chief of Museum Services, Sagamore Hill NHS, *Resource Management Plan, Sagamore Hill National Historic Site* [draft] (U.S. Department of the Interior [DOI], NPS, 1992), p. 38.

[4] Wake Forest University, Winston-Salem, NC, 1980.

[5] John Gable, recorded interview with author, August 12, 2004.

received. But another factor proved decisive in Sagamore Hill's receiving endowment funding for the interior restoration. For some years, the TRA had ensured that most endowment spending was directed towards an expensive renovation of the Birthplace in New York. This had been completed in 1977. At Roth's urging, the TRA agreed that, starting in 1980-81, Sagamore Hill would now be given priority.[6]

In the meantime, the NPS's North Atlantic Region placed Sagamore Hill on its list of parks "needing major rehab,"[7] and the reason seems to have been the planned interior restoration. Work began with Mrs. Roosevelt's drawing room (the large parlor across the hall from the president's library), but Roth emphasized that this would be but the beginning of a campaign that would take many years. After the drawing room came the library, the entrance hall, and the dining room, whose restoration – carried out with substantial input from the North Atlantic Historic Preservation Center, as well as private conservators – became the "major park cultural resource project" for 1981.[8]

These "re-restorations" suggest a significant change in policy. Agency experts had praised the TRA's restoration work when the park was acquired, and as recently as 1975, the park's *Historic Resource Management Plan* described the house as "thoroughly rehabilitated with due consideration given to its historic integrity."[9] Less than five years later, the campaign to restore the interiors indicates that the agency could at least see ways to improve on their work, a new attitude that may have been prompted by the arrival of Curator Roth. In 1984, Superintendent Schmidt put the case somewhat more strongly, noting that "a major house restoration began in 1979 to correct and undo many changes made by the 1950's interior 'rehabilitation' conducted by the Roosevelt Memorial Association prior to the opening of the historic house...."[10] However, Schmidt's views on the Theodore Roosevelt Association's work should be understood in context: she was making a case to the region to pay for a historic structure report, and the worse she could paint the existing situation, the stronger would be her case.

Following the restoration of the four major rooms, no other important interior work was carried out until the following decade. However, progress was made in other directions: a room-by-room inventory was carried out in 1983, room labels were replaced in 1985, a scope of collections statement was prepared in 1986, and a historic structure report was begun in 1988 (though not completed and published until 1997).

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[6] TRA Executive Committee Minutes, August 9, 1979.

[7] Memorandum, Chief, Interpretation, North Atlantic Region, to Manager, Harpers Ferry Center, May 30, 1979; Harpers Ferry Center, Box: SAHI.

[8] "Sagamore Hill National Historic Site 1981 Park Narrative Report"; NARA II - College Park, FRC Boxes: Superintendent "Annual Reports".

[9] Chief of Visitor Services and Chief of Museum Services, *Resource Management Plan*, p. 25.

[10] Resource Management Plan, FY 87, attached "Development/Study Package Proposal; SAHI: CRBIB Box #1.

Most important of all, though, was the launching of a historic furnishings report and plan in 1986. This was carried out by Dr. David Wallace of the Historic Furnishings Division at the Harpers Ferry Center. He was one the agency's leading experts in historic furnishings, and between 1985 and 1989 he read all of the Roosevelt family correspondence and diaries at Harvard University and the Library of Congress, and reviewed period accounts of the house and family. The first volume of his report, containing historical data, was approved in 1989; the second, containing a plan for refurnishing the house, appeared in 1991.[11] Meanwhile, Roth's successor, Curator Christopher Merritt, and his staff had made substantial progress in cataloging the collections in storage at Sagamore Hill, and had overseen projects to conserve historic paintings and books. When Martinez and Verone arrived at Sagamore Hill, the groundwork had been laid for the final stages of reinstallation.

The Refurnishing Project

It is difficult to characterize the *Historic Furnishings Report* succinctly, because its essence lies not in sweeping conclusions or bold policy initiatives, but in a mass of painstakingly reported details. It proposed no dramatic departure from the established interpretive framework, advanced no novel theory of historical recreation, and did not envisioned any change in the way visitors toured the house. It did set forth exactly how the Roosevelts and their guests (and sometimes their servants) used each room, noting minute changes in décor, and meticulously compiling the evidence for them. And it presented a complete furnishing plan for every room, from inkwells to tiger skins. It assigned literally thousands of objects to precise locations and justified their presence there – often based on historical evidence, but occasionally just "to make the room look functional." The major areas of controversy may be considered in turn.

• *The School Room*. A re-creation of the TRA that relied heavily on the memories of Ethel Roosevelt Derby, the room had in fact been used only briefly as a school room during the presidential years, and had been much altered in size and shape as a consequence of the Roosevelt Memorial Association's new stairway. Deeming it impossible to restore the room with the accuracy attained elsewhere in the house, the Furnishing Plan proposed to turn it into an exhibit space for Roosevelt family toys.

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[11] David H. Wallace, *Historic Furnishings Report*, *Sagamore Hill National Historic Site,* Vol. 1: Historical Data (2 vols.), Vol. 2: Furnishing Plan (Harpers Ferry, WV: U.S. DOI, NPS, Harpers Ferry Center, 1989 and 1991, respectively).

• *The nursery and master bedroom* (Fig. 33). The TRA had furnished the Nursery with toys and furniture illustrating the Roosevelt children's upbringing, rather than any specific period. They had also moved a very large wardrobe, known to have been in the nursery, into the master bedroom because it matched other furniture there and could be seen better. The Furnishing Plan proposed a "radically different approach":[12] to use documents and photographs to restore the nursery to the period of 1917-19, when it was a day nursery for Roosevelt's grandchildren; to return the wardrobe to the nursery; and to move most of the furniture and playthings installed by the TRA to the erstwhile School Room.

• *The de Laszlo portraits*. During the presidential years, a portrait of Mrs. Roosevelt by Philip de Laszlo had hung in the library: it was there, as Ethel Roosevelt Derby explained, so that her husband could see it (Fig. 34). The TRA moved the portrait to the drawing room so that visitors could see it. There, too, it would symbolically represent Mrs. Roosevelt in her own room. The association also brought in a new portrait, a 1922 copy of de Laszlo's portrait of the president, and placed it in the north room. "It seemed wise to the Committee," explained Mrs. Derby, "and I am sure they were right, to have it because they said it looks as if TR is welcoming you as you came in the house."[13] The Furnishing Plan initially proposed to remove the president entirely and relocate Mrs. Roosevelt to the library. After discussions with the TRA, it was agreed to put both de Laszlo portraits along the wall of the main stairway.

Gable did not attack the accuracy of the changes proposed by the Park Service. His objections centered on how they would affect the house's overall message and presentation. To introduce a "museum-display room" on the third floor, he argued, would "destroy the visitors' sense of the 'house as a house'": it would be "jarring." This was, of course, precisely why both the NPS and the TRA had been glad of the opportunity to remove the exhibits in 1966, and Gable reminded the agency of this. "Keep museum displays in old [*sic*] Orchard, where they belong," he advised. If the agency was unwilling to retain the school room, it would be better simply to close it than use it for museum exhibits. Regarding the Nursery, the TRA objected to shifting the interpretive focus away from the earlier period of Roosevelt's children, and he pointed out that the present furnishings and toys were mostly original to the house. As for the wardrobe, placing it in the nursery would make it difficult if not impossible for visitors

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[12] Wallace, *Historic Furnishings Report*, vol. 2, p. 104.

[13] "Interview with Mrs. Ethel Roosevelt Derby at Sagamore Hill," [1962], pp. 12-13; Northeast Museum Services Center, Charlestown Navy Yard (NMSC), CRBIB.

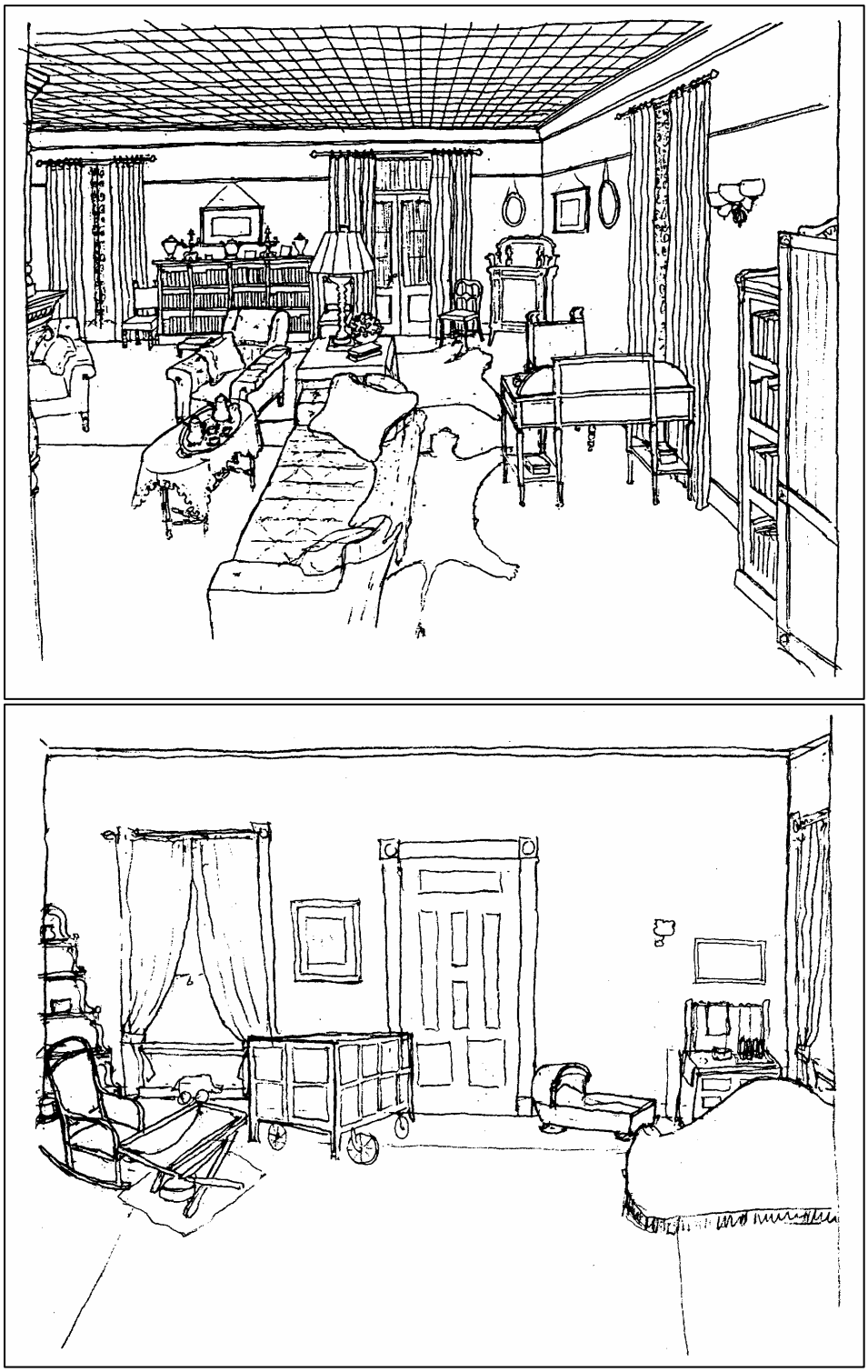

Fig. 33. The refurnishing of the Drawing Room (top) represented a "minor rearrangement" of work done in the 1980s. That of the Nursery (above) was a "radically different approach" to the restoration installed in 1966. (Drawings prepared for and reprinted from David H. Wallace, *Historic Furnishings Report, Sagamore Hill*, Vol. 2.)

Fig. 34. A 1948-49 photograph of the library by T. Rohan for the Theodore Roosevelt Memorial Association shows the portrait of Edith Roosevelt in its accustomed place opposite the president's desk. (Courtesy Sagamore Hill NHS: SAHI 1373.)

to see it. Finally, the association argued for keeping both Roosevelt portraits in the house, and in locations where the public could see them. "The interpretative [*sic*] importance of these two portraits cannot be overstated. The public needs to see pictures of Mr. & Mrs. Roosevelt in their house."

Though the Furnishing Plan did not consider the subject except in passing, Gable also took the opportunity to raise the issue of lighting once again. It was something he had criticized repeatedly since 1985, and the Park Service had carried out studies, rewired the house, and changed fixtures during the 1980s. "The house is simply too dark to be seen properly," he now said. "Visitors complain constantly about the visibility of rooms, especially the North room. When I take people through the house these days, I use a flash light!" While Gable recognized the importance of issues "ranging from safety to historic atmosphere," he concluded that "Lighting is more important to the visitor than any of the changes contemplated in this report, and we are, after all, running this site for the public."

Gable's letter was carefully considered by the park, Harpers Ferry Center, and NPS regional headquarters. In the end, Regional Director Rust announced a resolution

that largely upheld the Furnishing Plan, though with important compromises. The school room would not be restored, but the space would be closed to the public. Acceptable locations would be found for the portraits. And the Park Service would address Gable's long-standing dissatisfaction with lighting.

On January 2, 1993, the Theodore Roosevelt Home closed in order to carry out the new installation. The second-floor rooms were emptied so that floor and walls could be restored by the Building Conservation Branch of the region's Cultural Resource Center. The house was cleaned from top to bottom. Ultraviolet-filtering film was applied to windows throughout the house. Old wooden barriers were removed from doorways and replaced with ropes and stanchions. Conservation projects were completed. Then thousands of objects – furniture, carpets, books, pictures, animal skins, lamps, silverware, and mementos – were placed according to the Furnishing Plan's instructions. Six months later, on July 3, 1993, Roosevelt family members and friends of the park were invited to see the refurnished rooms, and on July 4 the house opened to the public with a band concert and speeches. Superintendent Martinez had worked with local tourism promoters to stimulate interest in the house, and public response to the reopening was overwhelming. Some 4,000 people attended the July 4 festivities, and visitation spiked from a July average of under 11,000 to more than 25,000 that month – despite the new policy that restricted access to guided tours. Though this change prompted some criticism, the response of the press to the reopened rooms was strongly positive. *Newsday* commented that visitors could now see the house "just as TR did, right down to the shower in his bathroom."[14]

Managing Sagamore Hill's Collections

In focusing resources on the park's collections, the refurnishing project had also sharpened the need to move forward on collection issues that had begun to receive attention during the 1980s. One was cataloging. Thanks to external mandates, the park's archeological collections had been fully cataloged by 1992. But many of the park's artworks, ethnographic artifacts, archival records, photographs, and articles of furnishings – including great numbers of items directly connected to Roosevelt, the Roosevelt family, and the Theodore Roosevelt Association – still awaited cataloguing. These were incomparably the more valuable collections.

The impetus came, once again, from external programs. Following the launching of the region's Collections Accountability Project in 1985, New York University's Museum Studies Program had been retained to assess the region's archives. They were huge, and most parks were not equipped to follow professional archival standards in managing them. Using accountability funds from the Washington Office, the region

[14] *Newsday*, editorial, October 3, 1993.

hired a Project Archivist (later to become North Atlantic Regional Archivist) to survey the collections, establish guidelines and standards, and implement them under regional supervision. A survey instrument created by the Regional Archivist, in collaboration with the Regional Curator, found 95,807 archival items at Sagamore Hill, including more than 11,000 photographs, 16,000 NPS records, 39,600 TRA or other records that predated the NPS, and about 40,000 items in cataloging backlog.[15]

The first archival collection to be addressed was the TRA archives, which documented (among other things) the association's management of Sagamore Hill and the Birthplace. In 1992, the papers were sent to Boston to be organized by the Collections Accountability Team, but since the association still owned them, federal cataloging funds could not be used. In 1993, an agreement was reached with the TRA under which the association would donate "archival materials relevant to the respective sites" to the NPS, while those relating to the Roosevelts would go to Harvard University.[16] The archive was catalogued. And by 1994, the Archival Accountability and Backlog Cataloging Projects had also completed a "major reorganization" of the park's photograph collection, having catalogued 20,323 items.[17]

At the park, cataloging raised more basic issues of record-keeping. In the 1960s, Jessica Kraft and her staff had cataloged 8,000 objects on exhibit in the period rooms at the Theodore Roosevelt Home. The records followed the NPS cataloging format, which meant that information was limited to what could fit on a 5-by-8 inch sheet. Subsequent curators followed this pattern until the Washington office introduced new service-wide standards in 1984. Under the new guidelines, each park was required to catalog all of its collections in a computerized database, which would be included in an Automated National Catalog System, or ANCS. This the Museum Division in Washington would use "to demonstrate to the Congress that the National Park Service is carrying out its mandate to properly account and care for its museum collections."[18]

The introduction of the new system instantly created a backlog at every park with a collection, and Sagamore Hill was no exception. Cataloging had never caught up with the vast accession of objects that had come in 1963; now the park would not only have to

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[15] Steven James Ourada, "Archives and Manuscript Materials in Parks of the North Atlantic Region," 1992), pp. 3, 6, 7, 12, 66; SAHI: Curatorial Files.

[16] Letter, Gable to Steven Ourada, Regional Archivist, May 18, 1993. See also Gable to Ourada, February 22, 1993, and Rust to Gable, January 29, 1993; NMSC, Regional Curator's Files, Folder: SAHI Operations/Evaluations. Of the papers donated to the NPS, the agreement provided for original documents to stay with the main TRA archive at the Birthplace, and copies to be made of those relevant to Sagamore Hill for deposit at the park.

[17] Ourada, Archival Accountability Project, Task Directive, FY 94, and Elizabeth M. Joyce and D.E.W. Godwin, *Completion Report FY93-94: Backlog Cataloging Project for Sagamore Hill Photo Collection*; SAHI: Central Files, Folder: H 20.

[18] Chief of Visitor Services and Chief of Museum Services, *Resource Management Plan*, p. 61.

finish cataloging its collections, but also update all of its existing records to match the new ANCS requirements. That was no small task. In 1992, while almost 10,000 of the park's 18,000-odd museum objects had been cataloged, only about 2,000 were in the ANCS database.[19] Four years later, the "entry backlog" had been eliminated by park curatorial staff assisted by volunteers. Later in the decade, the Sagamore Hill served as a test site for the development of an updated ANCS program.[20]

The most unusual collections-management problem faced by park staff concerned the ownership of some of Sagamore Hill's most popular historical objects. Quite simply, park staff did not know which of Theodore Roosevelt's guns belonged to the NPS and which did not. Like the cataloging backlog, this problem dated back to the park's entry into the National Park system. Though objects belonging to the TRA had been given to the government, not every object in the house belonged to the association. Some belonged to Roosevelt family members, others to the Boone and Crockett Club, and these were not given to the government. There was a further complication. The Roosevelt family had loaned some objects to the Boone and Crockett Club, and given others to the association; meanwhile, the association had lent some objects to the Roosevelts, while the Boone and Crockett Club – which occupied the Gun Room for more than a decade after the transfer – continued to acquire things. The potential for confusion was very great, and nowhere more so than with Roosevelt's guns.

The guns in question were those traditionally displayed in the house's Gun Room. By the 1960s, some of those belonging to Sagamore Hill had left the park, while those on display there belonged to several owners. In 1975, when the club stopped using the Gun Room on a regular basis, park staff suggested they donate whatever items they had there to the park: that would bring everything into one ownership and clarify the situation. "The answer then and now," wrote Roth two years later, "has been 'it's a matter of time.'"[21]

Time passed, until in 1988 an operations evaluation – presumably responding to Congress's concern about NPS collections – advised the park to resolve its title issues.[22] Four years later the *Collection Management Plan* identified the problems of "questionable ownership" and poor record-keeping as the park's primary cataloging needs. The issue came to a head in 1993, when the club asked permission to remove some of the guns for cleaning and restoration. Curator Verone and Superintendent Martinez balked: no guns would leave the park until the ownership question had been cleared up. The Boone and Crockett Club countered by claiming ownership of the guns,

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[19] Chief of Visitor Services and Chief of Museum Services, *Resource Management Plan*, p. 61.

[20] Curator Amy Verone to the author.

[21] Gary Roth, memorandum to files, December 26, 1977; SAHI: Curatorial Files.

[22] *Operations Evaluation, Sagamore Hill NHS: Final Report* (U.S. DOI, NPS, November 1988).

but the park refused to give up possession. Both sides delved into the records, which by then were complex and tangled.

At the outset, the Boone and Crockett Club claimed ownership of all 24 guns at Sagamore Hill, but the conflict raged back and forth. On March 7, 1995, Verone claimed 12 for the Park Service, conceded four to the club, and admitted that eight were in dispute. By March 17 the Secretary of the Interior claimed 13 and conceded three: a further three apparently belonged to the estate of Belle W. Roosevelt, leaving five in dispute. By September, the NPS had retreated to the initial 12, leaving six guns in dispute – or actually seven, because a 25th gun (a rifle on loan to the Buffalo Bill Historical Center in Cody, WY) had now become involved. Meanwhile, the club had given up some ground: it now claimed only 13 of the guns. The following spring, the club mounted a counterattack, prompting the NPS to reappraise the evidence, but this only strengthened the agency's case.[23]

In some ways the quarrel resembled the dispute over the Memorandum of Agreement that would erupt between the park and the TRA a few years later. On one side, park staff consulted the Regional Solicitor, Anthony Conte, who encouraged them to take a strong stand on behalf of the agency. On the other, the club clung fiercely to long-enjoyed prerogatives. This at least was the agency's perspective. "Mr. Gray is very emotional about the dispute," wrote Superintendent Martinez of Sherman Gray, the club's representative, "and will find it difficult to accept any resolution that does not support his thinking completely."[24] Like the TRA, the club appealed to higher authorities when its prerogatives were attacked. And it, too, based its claims on tradition: "...for some 30 years," Gray told Congressman Don Young, "both the Club and the National Park Service have acted as if the guns belonged to the Boone and Crockett Club." Dismissing the agency's concern over ownership question, Gray portrayed the issue as a disagreement over whether the public could see the guns in the newly refurbished Gun Room. "Sagamore Hill has far more guns than they need and could spare a few," he continued, noting that the club wished to exhibit some of them at its new headquarters in Missoula.[25]

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[23] Memorandum, Verone to Martinez, March 7, 1995; letter, Secretary of the Interior Bruce Babbitt to Paul Webster (President, Boone and Crockett Club), March 17, 1995; letter, Superintendent Martinez to Webster, April 8, 1995; letter, Marie Rust to Sherman Gray, September 21, 1995; Sherman Gray, "Memorandum Concerning the Guns at Sagamore Hill," attached to letter to NPS Director Roger Kennedy, August 25, 1995; letter, Sherman Gray to Robert McIntosh, Jr. (Associate Regional Director), May 3, 1996; letter, McIntosh to Gray, May 28, 1996; all SAHI: Curatorial Files.

[24] Memorandum, Martinez to Field Director, Northeast Field Area, NPS, July 25, 1995; SAHI: Curatorial Files.

[25] Sherman Gray, memorandum to Paul D. Webster, attached to letter to Don Young, December 29, 1994; SAHI: Curatorial Files.

The club's effort to reach over the heads of park officials was not very successful. Congressman Young raised the issue with Secretary of the Interior Bruce Babbitt, briefing memoranda moved up the chain, but Babbitt supported the park.[26] Now Theodore Roosevelt, IV, presumably at the club's urging, asked John Gable for advice. Gable urged the disputants to seek arbitration, or compromise on shared custody for the guns. But the park's legal counsel believed that even discussing such half measures would weaken a strong federal case, and he could find no precedent for the federal government sharing ownership of a museum collection with a private organization; to do so would compromise the agency's ability to hold the objects in trust for the American people.[27] The fact was, the agency was out of patience. While negotiations dragged on, two of the guns that the park believed it owned (and for which agency officials felt responsible) remained outside the park. And so, while Gable was urging conciliation and compromise, Superintendent Martinez was preparing to initiate legal proceeding to confirm NPS ownership and "force the return of the two guns to Sagamore Hill, if necessary."[28]

The club now appealed to NPS Director Roger Kennedy. Conceding reasonable doubt about the guns' ownership, Sherman Gray once again emphasized tradition: Would not the Director "restore our former relationship" and preserve the "friendly, informal arrangement which existed before?"[29] Regional Director Marie Rust's reply conceded nothing.[30] Gray called it "a rather nasty bit of work."[31] He appealed once more, got a conciliatory note from the director,[32] and continued to press his case.

By 1996, Gray had become isolated; over his objections, the regional office reached an agreement with Roosevelt and club director Paul Webster.[33] It affirmed the agency's position: the federal government owned 12 guns and the club three. Ten remained in dispute. It was a good settlement for both parties. The club could take its

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[26] Memorandum, Verone to Martinez, March 7, 1995; letters, Babbitt to Paul Webster, March 17, 1995; see also Martinez to Webster, April 8, 1995; all SAHI: Curatorial Files.

[27] Letter, Gable to Theodore Roosevelt IV, June 24, 1995; and memorandum, Martinez to Field Director, Northeast Field Area, NPS, July 25, 1995; SAHI: Curatorial Files. It is unclear whether arbitration or mediation was intended: Gable used the former term, Martinez the latter.

[28] Memorandum, Martinez to Field Director, Northeast Field Area, NPS, July 25, 1995. The two guns in question were at the Buffalo Bill Historical Center and the Griffin & Howe gun shop. The deadline suggested by Martinez was January 15, 1996.

[29] Letter, Gray to Kennedy, August 25, 1995; SAHI: Curatorial Files.

[30] Letter, Rust to Gray, September 21, 1995; SAHI: Curatorial Files.

[31] Gray, "An Explanatory Note to Those Who Have Regularly Read the Recent Correspondence Between the Boone and Crockett Club and the National Park Service About the Guns at Sagamore Hill," October 16, 1995; SAHI: Curatorial Files.

[32] Letter, Kennedy to Gray, October 6, 1995; SAHI: Curatorial Files.

[33] Letter, McIntosh to Gray, May 28, 1996; SAHI: Curatorial Files.

three guns if it wished, or could keep them at Sagamore Hill. The 10 disputed guns would stay at the park and be subject to the same curatorial standards as those belonging to the park. The club would "contribute to the care and preservation of all twenty-five guns...through direct assistance and financial support," and NPS staff would have oversight over their conservation. The parties would collaborate on an exhibition, and efforts to resolve the remaining title dispute would continue.[34] The club liked the agreement well enough to have it signed in a ceremony at its annual meeting. The park called it a "major step towards resolving the park's most serious title dispute."[35] Achieving it had absorbed much of the curator's attention over four years, and had claimed the notice of the superintendent, the regional office, the agency's director, and even the Secretary of the Interior.

The gun issue was not the end of the park's title problems: there remained the rest of the Gun Room's contents. Over the next four years, the park's curatorial staff identified all club property at the park, including furniture, books, artworks, and papers, and sent 500 books and 11 cartons of papers to the club's new headquarters in Missoula, Montana. The club also picked up furniture and sculpture. Those objects that remained at the park were documented in formal loan agreements.[36]

One interesting question was not considered by agency officials. It concerned, quite literally, the park's title. Was the name "Sagamore Hill" an item of property? If so, who owned it? The Theodore Roosevelt Association at one time had taken these questions quite seriously, and had taken steps to assure its ownership of the name. The TRA would have liked Roosevelt's heirs to execute a document stating that the estate had conveyed the name to the association along with the property itself. But the heirs were numerous, and this was judged to be impractical. And so, in 1956, Ethel Roosevelt Derby signed an affidavit averring that her father had chosen the name, that it "came to be identified solely and completely" with the estate, and that it was still in use in that sense. This was not a perfect solution, but TRA trustee Lyman Tondel – a partner at a large New York law firm – assured Oscar Straus that it was the best that could be done to establish the association's ownership of the name.[37]

Did the TRA's ownership of "Sagamore Hill" pass to the federal government along with the park itself? The question has never been legally tested. But in practice, the association has continued to benefit from the name and its connection with the

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[34] "Agreement Between the National Park Service and the Boone and Crockett Club," signed by Paul Webster and Roger Kennedy, June 21, 1996; SAHI: Curatorial Files.

[35] "Annual Report," 1996.

[36] Curator Amy Verone to the author.

[37] Affidavit of Ethel Roosevelt Derby, signed February 8, 1956, with covering letter from Lyman M. Tondel, Jr., to Oscar Straus, January 17, 1956; SAHI, TRA Records, Box 9, Folder 24.

property. In 1979, the association gave favorable consideration to a proposal by Pepsico to launch a chain of "TR's Restaurants," each loosely modeled on Sagamore Hill and each paying annual dues of perhaps $1,000 to the association for "Theodore Roosevelt Association cooperation."[38] More than 40 years after the donation, it collects licensing fees from companies that sell teddy bears and other items. And while it shares the proceeds with the Friends of Sagamore Hill,[39] none of the revenue flows directly to the park.

Preserving the Theodore Roosevelt Home

Just as the refurnishing project sharpened the need to resolve long-standing curatorial issues, it also focused attention on shortcomings of the Theodore Roosevelt House itself. Viewed as an architectural object, the building was in reasonably good condition at the beginning of the 1990s. It had recently been reroofed and repainted: it would be painted once again in 1995. Substantial repairs had been done to its exterior woodwork. Viewed as a museum environment, however, the house left much to be desired. The problems had to do with its mechanical systems: heating, lighting, security, and fire protection. Each had a direct effect on the presentation and preservation of the thousands of objects that the refurnishing would place in the house. Thus, in 1991 a visiting conservator from the Harpers Ferry Center advised park staff to correct "fluctuating and excessive temperatures and humidity, uncontrolled light levels, as well as pest infestation of objects," since these problems were "major factors in the rapid consumptive use of all types of objects at this site."[40] Park staff understood these and other problems perfectly well. Some proved easier to solve than others.

One danger that worried park staff a good deal at the beginning of the 1990s was fire; another was theft. Efforts to improve the house's fire-prevention and security systems, discussed in Chapter 4, were reasonably successful. Quite unsuccessful were continuing efforts to improve the house's heating and ventilating system, which subjected collections and architectural woodwork to damagingly hot and dry air during the winter, yet allowed the build-up of extremely high humidity in the summer. This was a problem that had been diagnosed as early as 1974, yet has continued to resist all attempts at improvement. This, too, has been described in Chapter 4.

Perhaps the most puzzling problem to confront park managers was the house's interior lighting. Like its climatic conditions, this has proven to be highly resistant to solution, although for different reasons. The difficulty with lighting was that the

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[38] TRA Executive Committee Minutes, August 9, 1979.

[39] SAHI Curator Amy Verone to the author by via personal communication, February 4, 2004.

[40] Memorandum, Museum Technician Alice Newton to Acting Chief, Division of Conservation, July 29, 1991; SAHI Curatorial Files, Folder: Conservation HFC.

problem was not clearly defined. In this Sagamore Hill was no different from other historic houses. Whereas experts could prescribe optimal conditions of warmth and humidity – and could point to the disastrous effects of divergence from that ideal – they could not do the same for light. The ideal changed according to one's perspective on the problem. From the point of view of protecting historic artifacts, the optimal lighting condition would be total darkness. Conservators therefore typically argue for the lowest possible light levels. But visitors have quite different demands. Accustomed to the high light levels of modern buildings – unprecedented in the history of the world – some visitors are frustrated by the dimness of historic houses. The fact that they are seeing Roosevelt's trophy room (for example) exactly as he saw it may not assuage their feeling that there is simply not enough light to see it properly. These visitors will demand higher light levels. Caught between the conservators and the visitors are site managers, curators, and docents, who must be responsive to both positions. They themselves may hold conflicting desires: on the one hand, to present the house exactly as its original occupants saw it; on the other, to show off prized furniture and paintings with museum-quality lighting. It is literally impossible to satisfy all of these conditions, and there are no generally accepted standards for balancing them. The search for an acceptable compromise is as much political as scientific.

To understand the lighting challenges facing Sagamore Hill's managers in the 1990s, a little background is necessary. Though electricity had long been available, Sagamore Hill continued to be lit by gas, supplemented by oil lamps, until near the end of Roosevelt's life. The house would have been considered very dark by later standards. The family carried candles through the halls at night and read by candlelight. In 1918, electricity was installed; gaslights and oil lamps were converted. But little if any new lighting was installed until after Roosevelt's death. Even then, Mrs. Roosevelt, who lived at Sagamore Hill until 1948, did not significantly modernize it. After her death, the TRA restored the house to something resembling its gas-lit appearance, replacing original electric fixtures with gas fixtures wired for electricity.

Lighting became an important focus of attention for park managers following the interior restoration of the early 1980s, and about the same time Superintendent Schmidt began to focus on the heating problem. In 1983, the NPS rewired 75 per cent of the house, introducing table lamps, sconces, area lighting, and low-voltage lighting. The goal was to more closely approach historical conditions, "and yet at the same time try to improve viewing of objects, provide adequate illumination for the safety of the public, and eliminate dark spots."[41] Maintenance Mechanic Willy Stein recalls that this was a

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[41] Memorandum, Regional Electrical Engineer Gene Flanders to Chief, Engineering, North Atlantic Region, April 11, 1994; SAHI, Central Files, Folder: H 30. See also Memorandum, James E. Skelton to Contracting Officer, NARO, February 10, 1983 (regarding interviewing two firms to carry out the work); NMSC, Regional Curator's Files, Folder: SAHI Electrical Systems.

major undertaking.[42] In some rooms, existing fixtures were converted to low-voltage fixtures; elsewhere, historic or replica fixtures were added. In still other locations, modern-style wall and ceiling washes were installed. One, an "up-light" in a stair hall, was known as the "bird bath" until it was removed some years later.

The park's effort to balance modern expectations of bright interior lighting with an authentic presentation of historical conditions left some visitors still wishing for more light – not only to see the interiors, but also to read the interpretive signs, upon which most visitors depended for information. A Port Washington resident complained to Superintendent Schmidt in 1986 that the signs "remain as unreadable as they have for years, because of inadequate lighting." A ranger, he said, had actually told him this was "'the single biggest complaint'" at the house.[43] But the most persistent critic was the TRA's John Gable. Starting in 1985 he "repeatedly communicated" the association's "displeasure with the lighting situation,"[44] and on one of those occasions, Regional Director Herbert Cables offered an explanation of the agency's goals. The Park Service, he wrote, had tried to light the rooms "in a manner that would have been typical during Theodore Roosevelt's occupancy." Cables admitted that "by contemporary standards," the resulting rooms might "appear dark and dim to some visitors." Still, he pointed out, the NPS had installed some additional lighting, and it planned to add more spot lighting as well as historic wall sconces.[45] The agency, in other words, had sought to bring about a compromise between historical accuracy and modern expectations. But the results were not satisfactory. In 1988 – presumably in response to Gable's criticism – the park programmed $30,000 in public funds, and requested a further $10,680 in TRA endowment funding for "lighting improvements." This was the largest item in that year's endowment funding request, and it would cap substantial efforts made since the 1983 upgrade. The park had purchased lighting equipment, ordered room labels "with higher visibility," and hired electricians to correct "flaws" in the electrical system.[46]

The lighting issue became a philosophical as well as a practical problem for regional officials. The Furnishing Plan proposed to restore the house to the conditions of Roosevelt's last year. To regional officials, this implied acceptance of the electric

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[42] Willy R. Stein, recorded interview with author, December 7, 2004 (recording at Sagamore Hill).

[43] Letter, Alan K. Hogenauer to Superintendent Loretta Schmidt, November 25, 1986; Federal Record Center, Waltham, MA, Acc. 79 93 0002, Box 1, Folder: A 3615 - SAHI.

[44] According to letter, Gable to John L. Bryant (NPF), August 31, 1988; CRM Division Records, NMSC, Regional Curator's Files, Folder: Curatorial, SAHI through 1988.

[45] Letter, Cables to Gable, December 3, 1986; NMSC, Regional Curator's Files, Folder: H30-SAHI.

[46] "Sagamore Hill NHS, 1988-1989 National Park Foundation Grant Program," August 30, 1988. Also covering letter, Gable to John L. Bryant, Jr. (NPF), August 31, 1988; CRM Division Records, NMSC, Regional Curator's Files, Folder: Curatorial, SAHI through 1988. Also Diane H. Dayson, "Theodore Roosevelt Association Grant Request, Lighting Project," April 1, 1988, with cover memorandum to Regional Director Herbert Cables (as above, Folder: SAHI Lighting Project).

lights that had been installed then. They thus disagreed with the park's intent to recreate the earlier gaslight appearance. Yet given the dearth of documentation on the original electric fixtures, the regional office had to agree that gas lamps (suitably electrified, of course) offered a more practical solution.[47] Still, it is noteworthy that the disagreement concerned only which historical condition to replicate: that the lighting would resemble *some* historical condition was assumed.

By the end of 1989, old electrical fixtures discovered in the attic had been reinstalled. Ambient lighting (including fluorescent and halogen lamps) had been introduced in the Trophy Room, Library, and Kitchen, and other modern wall and ceiling lights had been removed. Richard Crisson, a historical architect with the region, wrote that "the overall effect appeared quite good and seems to be an improvement."[48] The changes generally followed the approach Cables had explained in 1986: an approximation of historic conditions, tempered by discrete efforts to raise lighting levels where visitor comfort or safety suggested it.

Still Gable was not satisfied. And in 1992, the TRA's negotiations over the Furnishing Plan put the lighting issue back on the table. The agency agreed once again to address it: it had become a bargaining chip that NPS negotiators could concede while holding the line on other aspects of the plan. Although Gable remained "completely at odds" with the Park Service over the school room and nursery, he told everyone – curator, superintendent, regional director, Washington office – that he was "very pleased that the problem of lighting will, it seems, be addressed soon."[49]

By 1993 agency experts were at work on the problem. The supervisor of the region's Building Conservation Branch characterized it as a "combined problem of inconsistent representation of historic lighting and insufficient levels of light in the room."[50] That was to formulate the problem at its most theoretically challenging and complex level. But at bottom, managers faced a single, stark question: should light levels be raised? The TRA wanted more light; the NPS was prepared to treat the entire issue as

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[47] Memorandum, Associate Regional Director, Planning and Resource Preservation, to Superintendent, December 2, 1988; Northeast Regional Office, Boston, History Program Files: Section 106 Compliance Files.

[48] Memorandum, Historical Architect Richard Crisson to Associate Regional Director, Planning and Resource Preservation, December 7, 1989; Northeast Regional Office, Boston, History Program Files: Section 106 compliance Files). See also documents in NMSC, Regional Curator's Files, Folder: Curatorial, SAHI 1989 –.

[49] Letters, Gable to Wallace, January 3, 1992; to Patten, January 2, 1992; and to Martinez, January 14, 1992; all SAHI: Central Files, Folder: A 42. The quotation is from the Wallace letter.

[50] Memorandum, Stephen Spaulding to Chief, Division of CRC, NAR, April 12, 1993; CRM Division Records, Northeast Region, Regional Curator's Files, Folder "SAHI, Operations/ Evaluations".

an association matter, referring lighting studies and consultant proposals to the association for approval;[51] and so this simple question drove the debate.

It is tempting to assign responsibility for the steady ramp-up of lighting levels over the past century or so to lighting engineers and consultants. At Sagamore Hill, the reverse was true. NPS Regional Electrical Engineer came right to the point. "[T]he lighting that now exists," wrote Gene Flanders in 1994, "far exceeds light levels of period lamps when the home was occupied. True, there are some dark spots, and there should be if you are trying to duplicate the way it was then." Flanders' prescription for addressing complaints was straightforward: "The public needs to be better educated – that in those times they did not have the luminance values, controls, color rendition, lamp lumen, aesthestics, that we have and enjoy today."[52]

Flanders was unquestionably right: Sagamore Hill had been very dark in Roosevelt's time. Gable's standard of comparison, however, was not Roosevelt's time. The house, he declared, was "now much darker than it was in the 1950s, 1960s, and 1970s."[53] This would be hard to prove – and certainly personal recollection would be at best a frail guide – but by 1994 it may have been true. It is hard to ascertain the net effects of the changes made in the mid- and late-1980s: in some rooms, the switch to low-voltage lighting probably meant less light, while in others the addition of fixtures may have meant more light. Willy Stein recalls that the 1985 changes put "a lot of light" in the hallways, though some of this was removed later in the decade.[54] The Furnishing Plan itself triggered a change that may have reduced ambient light levels. The liquid ultraviolet-filtering coating that had been applied in 1974 to windows in direct sunlight in 1974 had lost its effectiveness. Now, responding to conservators' calls for lower light levels in order to protect collections and architectural woodwork, new film was installed throughout the house. The manufacturers claimed that it would cut ultraviolet light by 98 per cent and visible light by 50 per cent. Did the new film reduce light levels in the house? Did it reduce the light entering the windows more or less than the film it replaced? Did it affect visitors' experience of the house? These are surprisingly subtle questions. Immediately after the installation, Curator Amy Verone wrote that the film

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[51] For example: "The Theodore Roosevelt Association has requested evaluations, assessments, alternatives and recommendations for the Upgrade of the Ambient Lighting...." Archetype Architecture, Inc., "Assessment Study for the Upgrade of the Ambient Lighting - SAHI," 25% Submission, December 6, 1995, Executive Summary; SAHI: CRBIB, Box. No. 13.

[52] Memorandum, Flanders to Chief, Engineering, North Atlantic Region; NMSC, Folder: Curatorial, SAHI 1989 –.

[53] Letter, Gable to Martinez, November 18, 1991; SAHI Curatorial Files, Folder: Refurnishing Project.

[54] Willy R. Stein, recorded interview with author, December 7, 2004.

was almost invisible and was unnoticed by visitors. Park officials continue to feel that its effect is negligible. Still, some effect may have been perceived by sharp-eyed critics. [55]

The agency was committed to raising the light level. There was more than one way to do so. Electrical Engineer Flanders urged his colleagues to leave the house's wiring alone: much could be done, he urged, with "opening drapes, and withdrawing window shades, when it is being viewed by the public." But historical architect Richard Crisson responded to the "lack of ambient lighting" with a task directive designed to "upgrade" the lighting with a combination of period fixtures, appropriate replacements, and "innovative" solutions involving "contemporary" methods to "increase the interior ambient lighting levels." Glass-fiber optics looked promising. Proposals from five consultants were evaluated in 1995 and referred to the TRA for decision.[56] Archetype Architecture, Inc., was retained; the firm made a site visit in August 1995, and by the spring of 1996, the study had reached the 50%-submission mark. But in the end, nothing was done. The reasons are unclear, but Maintenance Mechanic Willy Stein believes the condition of the house's wiring had something to do with it: during the early 1990s, agency staff discovered that some of the contractor's work of almost a decade earlier had been faulty.

Today, conflicts over the lighting are not entirely resolved, nor is park staff entirely satisfied with it. It remains a complex problem, and one without a clear methodology to guide park managers. The agency's established approach – a relatively high-impact approach that involves intervening in the house's wiring and fixtures to attain an approximation of historic conditions with selectively higher light levels – remains one option. Engineer Flanders' approach – a decidedly low-impact approach – offers park managers another.

Interior Rehabilitation

When the Furnishing Plan was completed in 1991, Sagamore Hill presented a mixture of historical interiors from three different campaigns. The TRA's exhibit

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[55] Readings were taken to test the old film's effectiveness in 1990. A textile conservator from the Harpers Ferry Center took similar readings the following year. For the original film, see "Historic Resources Management Plan," 1975 p. 47; for 1992 readings, "Historic Resource Management Plan," p. 52. Task Directive, Installation of UV Filters at the President's Home, March 5, 1992"; SAHI: Central Files, Folder: H 20. *Manufacturer's claims*: Request for Section 106 Approval, April 12, 1993; SAHI: Central Files, Folder: H 30. *Invisible film*: letter, Verone to Steve Pesce (New York Window Film), September 20, 1993; SAHI: Curatorial Files, Folder: UV Filters Project 1993. *Negligible effect*: Susan Sarna, interview with author, February 13, 2004.

[56] *Flanders' advice*: Memorandum, Flanders to Chief, Engineering, North Atlantic Region; NMSC, Folder: Curatorial, SAHI 1989 –. *Task directive*: memorandum, Manager, CRC, Myra F. Harrison to Vidal Martinez, April 4, 1994, with Task Directive prepared by Richard Crisson, April 14, 1994. *Consultants' proposals*: memorandum, Crisson to Martinez, April 12, 1995; SAHI: Central Files, Folder: H 30.

galleries on the third floor had been refurnished as period rooms in 1966; four major rooms on the first floor had been restored in 1979-82; and the rest of the rooms had not changed much since the association had restored them in the 1950s. The refurnishing plan created a momentum to restudy, rehabilitate, and restore these architectural settings. In 1993, six upstairs rooms were restored with "historically accurate wall and woodwork treatments."[57] However, an interior finishes analysis concluded that the upstairs hallways had been too severely altered – largely by the Roosevelt Memorial Association's reconfiguration, which changed their layout, but also by later NPS repairs – to justify restoring their original finishes. Instead, the plan called for painting them in a "contemporary color that meets the requirements of the halls today."[58] The completion of this project left four rooms on the second floor, and seven on the third floor, awaiting restoration. In 1996 the park requested $150,000 in One Year funding to restore them.[59] Funding was not provided for all of the rooms: when the park completes those remaining on the third floor, it will have completed a cycle of restoration begun in 1979.

One very small improvement prompted by the refurnishing had far-reaching implications. Since the 1950s, staff had greeted visitors and sold tickets at a desk stationed in the front hall. It was not an ideal arrangement. The clutter distracted visitors from the house's ambience, while staff shivered in winter and stewed in summer. As early as 1963, NPS staff writing the *Master Plan* had envisioned removing the desk.[60] But doing so would require finding another location for ticket sales and orientation, which again highlighted the need for a visitor center. And so the awkward arrangement continued. As late as 1991, the Furnishing Plan called it "perhaps unavoidable under present circumstances."[61] Yet when the house reopened in 1993, the desk was gone: Visitors' first impression was of a house whose every detail spoke of Roosevelt and his family.

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[57] Letter, Regional Director Marie Rust to Don Klima (Advisory Council on Historic Preservation), March 18, 1993; SAHI: Curatorial Files, Folder: Refurnishing Project. The work, including removing existing wallpaper, repairing, preparing, and washing surfaces, repainting walls and ceilings, and cleaning woodwork, was carried out by a day-labor crew from the Building Conservation Branch, supervised by an Exhibit Specialist, at a cost of $103,504.38 (Rick Morrison and Lisa Zukowski, "Completion Report: Interior Rooms Restoration (2nd and 3rd Floors) Home of Theodore Roosevelt," February 16 - April 29, 1993; SAHI: CRBIB, Box # 10.

[58] Marie L. Carden, "Interior Finishes Analysis of 2nd and 3rd Floor Halls at Theodore Roosevelt Home," January 1993 (revised February 1993), p. 13; SAHI: CRBIB, Box No. 12.

[59] Project Directive: One Year Program, "Install Historic Finishes in Eleven Rooms in the Roosevelt House," prepared August 26, 1996, attached to memorandum, Martinez to Superintendent, New England System Support Office, September 4, 1996; SAHI: Central Files, D 2621. The proposed treatments included removing wallpaper, stabilizing and repairing walls, and installing new wallpaper or paint.

[60] *Master Plan* (May 1963 version), Preservation and Use Objectives, p. 6; NMSC, CRBIB).

[61] Wallace, *Historic Furnishings Report*, Vol. 2, p. 4.

Though a tiny change, it was a momentous one. Beyond improvements in historical accuracy, beyond even the improvements in security that made it possible, the vanished desk signaled the most far-reaching changes to Sagamore Hill's visitor experience since the park's opening. These included the renegotiation of the park's concession contract, the restriction of public visitation to guided tours, and the development of a visitor contact station. Together, these changes created their own ripples that expanded through the park's visitor services, its architecture, its landscape, and even its administration.

INTERPRETING SAGAMORE HILL: TOURS, CONCESSIONS, AND A VISITOR CONTACT STATION

In 1953, Mrs. H.D. Bullock, Chief of Research for the National Trust for Historic Preservation, made a site visit to Sagamore Hill and left a lively record of her impressions. "The crowds were moving at will through the house," she commented,

> ...which made for a great deal of good-natured confusion. People were moving in two directions around most of the room entrances, and up and down narrow stairs. One had to stand in the hall while groups of three or four looked at each room and read off the inscriptions on the wall to each other.

Mrs. Bullock spotted problems. A cloisonné bowl was in danger of being knocked over. "Children play with the gong in the hall, and people finger the animal skins on the wall." But on the whole, she enjoyed herself:

> I was particularly impressed with the enthusiasm expressed by the young children. I have watched them all too often being dragged through other historic houses, being bored and restless. But here they were fascinated by the animal trophies, and the boys captivated by the guns, knives and rough-riding relics. The little girls were simply enchanted with the dolls and toy furniture in the nursery, by the children's clothes and small sewing machine.[62]

This free-and-easy approach lasted essentially until 1992. Its attractions were obvious. But it also posed problems for visitors and management. There was not enough staff to guide and inform visitors as they made their way through the house, so visitors had to rely on printed labels for information – and then sometimes complained of inadequate lighting. There was also not enough staff to protect the collections from theft, which the 1988 *Operations Evaluation* called the most serious threat to the park's collections. Finally, architects worried that the passage of more than 100,000 visitors

[62] H.D. Bullock, "Appendix A, Field Trip, Sagamore Hill, Oyster Bay, Long Island," n.d. [1953]; SAHI Archives, TRA Papers, Box 9, Folder 12.

through the house each year was dangerously stressing the lightly built structure. For years, park staff had worried about the cumulative effects of excessive visitation and had sought ways to cap it. Limiting access to guided tours was a drastic solution, but it was the solution adopted, and it was the system visitors encountered when the house reopened in 1993. No longer would visitors be able to tour the house as and when they wished.

The new system caused some initial confusion. Former Superintendent Martinez recalls that Long Island tourism agencies had promoted the park heavily in anticipation of the house's reopening, and when it did reopen, the park was simply unprepared for the crush of eager visitors. Success bred its own problems. Many visitors arrived expecting to be admitted to the house, but were turned away because tours were fully booked. The editor of *Newsday* was not admitted. "That didn't go over very well," recalls former Superintendent Martinez, and the editor threatened to write a critical editorial. But by meeting with him, explaining the challenges faced by the park and the reasons for the new policy, Superintendent Martinez and other NPS staff not only mollified him but won his support.[63] In the end, the press backed the new tour policy.[64] Park management liked it, too. Comments Amy Verone: "There were some complaints from the public, but the change not only improved the interpretive program, it has also allowed us to maintain the house in better condition and to reduce the casual wear and vandalism in the building (no more initials carved into the woodwork)."[65] John Gable also supported the new policy: it gave tourists an "enhanced visit."[66]

These successes were not achieved without cost. Initially, visitation soared; then, as the school year started, it dropped back to normal levels.[67] And since 1994, annual visitation has been well below previous peaks: over 135,000 in 1988, for example, versus about 63,000 in 1994. However (as with earlier figures), it is not clear how reliable these numbers are. In 1991, well before the house closed for refurnishing, a significant drop in visitation had already taken place. Then, after leveling out at about 71,000 in 1995 and 1996, they jumped to 97,000 in 1997. The park's Chief of Interpretation and Visitor Services, Charles Markis, believes the increase reflected the public attention paid to Theodore Roosevelt – including a series of television documentaries – as various Roosevelt centennials were observed between about 1995 and 1998. After 1998,

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[63] Vidal Martinez, recorded interview with author, January 14, 2005.

[64] See press clippings: SAHI: Central Files, Folder: K 34.

[65] Curator Amy Verone to the author via e-mail, February 6, 2004.

[66] Bill Bleyer, "Plans for Sagamore," unattributed press clipping, late 1993; SAHI: Central Files, Folder K32.

[67] "Sagamore Hill National Historic Site 1993 Annual Narrative Report"; SAHI Central Files, Folder: A 2621.

visitation dropped sharply again, and since 2001 it has hovered between 41,000 and 45,000. Perhaps this reflects post-centennial exhaustion. But how great has the decline really been? Markis, who arrived in 2001, emphasizes that he has made a point of collecting accurate visitor counts, and has urged docents and other staff "not to try to guesstimate or inflate figures." Since 2001, he explains, the counts represent the number of tickets sold for house tours: they do not capture vehicles entering the park or walk-in visitors who do not buy tickets. A count done in this way would obviously yield a much lower number than the procedure instituted in 1974 (see Chapter 4), and Markis believes that current numbers do not in fact represent a real drop in visitation. He suspects that past figures were inflated, and doubts whether the house could ever have accommodated the numbers reported in the 1980s.[68]

If the visitation statistics are murky at best, it is at least clear that the new tour policy set a cap on admissions to the Theodore Roosevelt House. And at peak times, such as summer weekends, that cap was below public demand. Since the park had long sought ways to alleviate the pressure of visitors, this was a desirable outcome. Yet while reducing the strain on the park's physical resources, the new tour policy put new demands on its staff and budget, particularly a need for more trained interpreters or docents. There was little or no chance of creating new salaried positions, so some full-time-equivalents were shifted from maintenance into interpretation, adding to the strains on the already hard-pressed maintenance department.[69] Superintendent Martinez also turned to volunteers. Sagamore Hill's volunteer docents have been able to offer a level of guide service that generally gets high marks from visitors and park staff, but training and managing them places its own burden on regular staff.

In barring some hopeful visitors from the house, the new tour policy also enhanced the potential value of the park's other assets. There was the landscape, and there were the exhibits at Old Orchard. But in 1993 the landscape presented an appearance very different from its historical condition and was interpreted only by a few wayside exhibits, while the exhibits were old and hardly engaging to visitors. A third potential asset – a visitor center – did not exist at all, and ticket sales were handled in an information kiosk by the parking lot. The new policy added urgency to long-standing plans to provide or upgrade all three.

The Concession and the Visitor Contact Station

For 30 years, NPS planners had set their sights on a visitor center. The *Master Plan* of 1963 had envisioned one, the 1970 *Interpretive Prospectus* an even bigger one.

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[68] Information supplied to the author by Charles Markis via e-mails, February 2005.

[69] Willy R. Stein, recorded interview with author, December 7, 2004.

But agency policy had cooled on building visitor centers just when the lack of a clear landscape plan for Sagamore Hill was frustrating all expansive proposals.

Efforts had been made to address the lack of visitor orientation. In 1968, an information kiosk was built. In 1981 it was moved to the fringe of the parking lot: from then on it was staffed in July and August and used to collect fees. This at least put a uniformed official on the front lines of visitor contact for two months of the year. In 1987, an orientation panel and bulletin board were put up next to the kiosk. This made more information available to the public, particularly when the kiosk was unstaffed, but the information was confusing: the new panel directed people towards Old Orchard Museum, while newly constructed pedestrian lanes pointed them the other way.[70] These were, in any case, minimalist solutions to the need for a visitor center.

Technically speaking, the park *had* a visitor center: Old Orchard had been described as such when it was rehabilitated in 1963. But it never really worked as one. It was off the main tourist route and could not be seen from the parking lot. Although roughly 95 per cent of park visitors toured the house, park planners calculated that fewer than half made the detour to Old Orchard. Later in the 1990s, planners would try to increase that fraction through improved signage; by 2005 a new pedestrian path, new exhibitions, air-conditioning, and perhaps more explicit encouragements from interpretive staff had boosted the total to about 75 per cent of park visitors,[71] but nothing short of physically moving the house or parking lot would put Old Orchard where a visitor center ought to be.

The concession building offered other opportunities, but also other problems. Its location, athwart the pathway from the parking lot to the Theodore Roosevelt House, had made sense during the TRA era. But after Old Orchard became part of the park, it no longer worked as well: it encouraged visitors to turn their backs on the museum. And, of course, it stood within the very center of the Roosevelt-era gardens.

The concession itself presented another set of issues. A fine bookstore would contribute to Sagamore Hill's interpretation, but the actual shop offered a poor stock of books. As the "Visitor Use Plan" judiciously remarked, it "leans rather heavily on gifts and curios" – or what one park official described more bluntly as "cheesy souvenirs."[72] In this it was not necessarily worse than the shops at many other parks. "The concessions shops were like novelty stores specializing in trinkets, pulp magazines, and comic books," writes Michael Frome of the 1960s and '70s. "Lavishly inelegant" is how he describes the shop at Glacier National Park. It featured items like sweatshirts with the

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[70] *Operations Evaluation,* November 1998, p. 25.

[71] Curator Amy Verone to the author via e-mail, February 2006.

[72] Curator Amy Verone to the author via e-mail, February 6, 2004.

slogan "I'm an alcoholic. Buy me a beer."[73] In theory, the expiration of concession contracts offered park superintendents an opportunity to negotiate better contracts or even replace their concessionaires, but the concessionaires enjoyed a privileged status that made it very difficult to displace them, or even pressure them into providing better service. This was particularly true after Congress passed the Concessions Policy Act in 1965. A Congressional study in 1976 found that concessionaires had undue influence over agency policies, and that the NPS's oversight was generally ineffective. However, the political climate of the 1980s – the Reagan years – gave new weight to the interests of concessionaires. NPS Director William J. Whalen lost his job in 1980 partly as a result of his efforts to clamp down on them.[74] And Reagan's controversial Secretary of the Interior, James Watt, was notably sympathetic to the goals of the "sagebrush rebellion," a movement to increase the rights of private property owners, even on federal land. NPS concessionaires were among the movement's leaders. According to Frome, NPS Director Russell Dickenson – Whalen's successor – "went easy" on them: according to Dickenson's Chief of Concessions Management, "his philosophy was to give the concessionaires what they wanted to keep his job."[75]

At Sagamore Hill, the impending expiration of the concession contract prompted park planners in 1978 to consider upgrading the concession and rehabilitating the building. But the contract was renewed with no changes. It expired again in 1983; once again planners considered the question, this time proposing an "ideal solution": closing the snack bar and converting the gift shop into a visitor orientation/fee collection station. But the contract was renewed once more and no action was taken. Vidal Martinez recalls his amazement, on arriving as superintendent in 1990, to discover that the first impression offered to visitors – their introduction to Sagamore Hill – was a low-grade souvenir shop that sold "jams, jellies, and baskets," Confederate hats, and pencils with the park's name misspelled ("That floored me," he says).[76] An operations evaluation carried out in 1991-92 proposed reducing the sales area and incorporating an area where NPS staff could greet and orient visitors – essentially the same idea that was proposed in 1983. Park officials hoped this arrangement would also encourage the concessionaire to upgrade its selection of books and other merchandise.[77] Martinez began to negotiate with the concessionaire and secured its cooperation. In 1992, the Saga-Hill Corporation offered $50,000 towards the cost of carrying out this plan in exchange for a 10-year

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[73] Michael Frome, *Regreening the National Parks* (Tucson and London: University of Arizona Press, 1992), p. 204.

[74] Frome, *Regreening the National Parks*, pp. 173-189.

[75] Frome, *Regreening the National Parks*, pp. 174-175.

[76] Vidal Martinez, recorded interview with author, January 14, 2005.

[77] Chief of Visitor Services and Chief of Museum Services, *Resource Management Plan*, p. 46.

contract renewal.[78] But soon, as Martinez puts it, things turned "pretty sour." The closure of the Theodore Roosevelt House for refurnishing cut into the concession's profits, and the owner, Jim Hill, objected. After it reopened, the park received a number of complaints from the public about the new tour policy, but Martinez discovered that the concessionaire was handing out leaflets that encouraged these complaints.[79] In the end, for family reasons, Hill decided to relinquish the concession. And so, generational change within the family-held corporation finally allowed the Park Service to do what careful planning, patient negotiation, and the normal exercise of vigilance over public land had failed to achieve: the replacement of an unsatisfactory concessionaire.

Hill's departure opened up the concession to other bidders, and made it easier to reconfigure the space. By the spring of 1996, the Eastern National Parks and Monuments Association, a well-known nonprofit organization that operated bookstores in many parks, took over the concession in a rehabilitated visitor contact station.[80]

The new arrangement produced the benefit foreseen by the planners of 1991-92, and the quality of the concession increased dramatically. Gone were complaints of tasteless souvenirs or paltry book selections. Between FY 1997, the new concession's first full year of operation, and 1999, Eastern National expanded its inventory from less than 100 to almost 400 titles. Sales climbed from $112,751 to $129,348 – growth of almost 15% in three years. Among Eastern National bookstores at presidential parks, Sagamore Hill was second only to the Lincoln Home. All of this was good for visitors, and also for park management. Eastern National donated a percentage of its profit to the park, and this had grown from $6,765.06 in 1997 to $8,752.48 in FY 2000.[81]

As for the visitor center component, the conversion worked well. "It's small" for greeting visitors, comments Curator Verone, "but it's better than the kiosk!"[82] And better by far than the desk just inside the front door of the Theodore Roosevelt House. Still, this visitor contact station was not a true visitor center: the park still lacked a real orientation or group staging area. The visitor contact station had a more serious shortcoming, and this lay in the realm of landscape. By the early 1990s, park managers and planners were focusing once more on the long-cherished goal of restoring the

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[78] Chief of Visitor Services and Chief of Museum Services, *Resource Management Plan*, pp. 46-47.

[79] Vidal Martinez, recorded interview with author, January 14, 2005.

[80] NPS documents and recollections do not agree about when the new concession opened. A memorandum from the park's Chief Ranger to Eastern National (December 9, 1996) states that the latter began operations on April 3, 1996; SAHI: Interpretation Files, Folder A42: Eastern National. The date given in the park's 1966 "Annual Report" is consistent with this.

[81] Memorandum, Superintendent to President, Eastern National, January 26, 2001, and President, Eastern National to Superintendent, December 30, 1997; SAHI: Interpretation Files, Folder A42: Eastern National. See also Martinez, cover letter to "Annual Report," 1998.

[82] Curator Amy Verone to the author via e-mail, February 6, 2004.

Roosevelt-era landscape. The concession building had always loomed as an obstacle to that goal. Now, rehabilitated and given a vital park function for the first time, it loomed yet larger. In short, converting the concession building solved the visitor-service problem at the expense of the cultural-landscape problem, which was attracting new attention at exactly this moment.

THE CULTURAL LANDSCAPE

Compared with its condition during the late 1970s or '80s, long-time park staff members Willy Stein and George Dziomba agree that, at the opening of the twenty-first century, Sagamore Hill's landscape is in relatively good shape. Indeed, said Dziomba in 2004, the estate today is "about the nicest it's been in 20 years."[83] Measured against what *might* have been accomplished, the changes are less impressive. There had been some progress in protecting the estate's historic appearance. Gray Cottage was restored, a National Environmental Study Area was declared, and a nature trail was constructed. The windmill was reconstructed; the Chicken House, Carriage House, and Tool Shed were rehabilitated; five acres of land was purchased along the estate's perimeter; and wayside exhibits were installed. Other projects, however – the construction of an information kiosk, the planting of a rose garden, and successive investments in the concession building – seemed rather to impede than to aid landscape restoration. As for the surviving landscape itself, underbrush and invasive woody growth were sometimes cut back, sometimes left to grow. All in all, these initiatives hardly affected the overall picture of the estate. They certainly did nothing to achieve the far-reaching goals set out by the *Master Plan* in 1963: to restore the estate's historic landscape, reconstruct the Stable and Lodge, and remove the concession building and parking lot. Nor did later park planning documents pay much attention to the landscape.[84] The *Resource Management Plan* written in 1992 could sum up the situation in severely negative terms:

> There is presently no effort to present the landscape at SAHI in a historic context. There is no information on how to restore the historic appearance of the grounds. The Maintenance staff has no plan or guidelines to follow in order to recreate the historic landscape."[85]

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[83] George Dziomba, recorded interview with author, December 7, 2004.

[84] For example, the 1970 *Interpretive Prospectus* called for construction of a new visitor center in the heart of the historic landscape. In a more positive vein, the *Resource Management Plan* of 1982 called for a historic resources study of "period vegetation," to be followed by restoration of the historic grounds.

[85] Chief of Visitor Services and Chief of Museum Services, *Resource Management Plan*, p. 67.

By 1992, however, things had begun to change. Late in 1990, the newly arrived Superintendent Martinez had announced his intention to focus on Roosevelt's "environmental and conservation interests,"[86] and that year, at the park's request, a cultural landscape report was launched.[87]

Factors in Considering Sagamore Hill's Landscape

During the early 1990s, several factors combined with reviving interest in its cultural significance to refocus the attention of Sagamore Hill's managers on the land surrounding its buildings. One was changing conditions around the park. Development pressures had increased during the 1980s, prompting managers to respond by marking boundaries, purchasing land, controlling runoff both from and onto adjoining properties, and worrying about the loss of historically significant views. The park's setting had changed, gradually but ultimately decisively, from the days when planners could be confident that large estates would provide a stable and supportive backdrop. By 1995 park staff could write that "The park now has neighbors on the west, north, and south sides, where there were only fields and woods before." A driveway had encroached on park land on one side, a boat basin on another. Or had they? Park staff could not be certain, because no one knew exactly where the boundaries lay. The last survey had been conducted in 1963; official park maps were inconsistent; and land purchases in the 1970s and '80s had rendered the old boundary markers inaccurate. A fence built in the 1960s was now "decayed and collapsed," and entombed in brush. The park was open to trespass, encroachment, and damage. It would cost $35,000 just to survey and mark the boundaries.[88]

At the same time, critically important infrastructure elements were wearing out, and repairing them called for landscape-scaled construction projects. The sewage

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[86] Bill Bleyer, "New Superintendent for Sagamore Hill," *Newsday*, January 4, 1991 (clipping in SAHI: Central Files, Folder K34).

[87] Regina Bellavia and David L. Uschold, *Cultural Landscape Report for Sagamore Hill National Historic Site*, Vol. 2: Treatment Recommendations and Implementation Plan (Boston, MA: U.S. DOI, NPS, Olmsted Center for Landscape Preservation, March 1998), p.1.

[88] *Neighbors*: Project Statement, "Resurvey and Remark Park Boundaries," last update, August 17, 1995, attached to memorandum, Acting Superintendent Amy Verone to Chief, Engineering and Maintenance, New England System Support Office, August 18, 1995. *Park maps*: "Outline of Planning Requirements, Sagamore Hill National Historic Site," May 20, 1977; North Atlantic Regional Office, Boston, Planning Files. *Fence*: Project Directive, "Survey and Remark Park Boundaries," prepared on August 26, 1996, attached to memorandum, Martinez to Superintendent, New England System Support Office, September 4, 1996; both SAHI: Central Files, Folder: D 2621.

systems were collapsing, requiring renewal of hundreds of feet of tiled sewage lines, septic tanks, and leech fields serving all of the public restrooms and some staff quarters.[89] The water system presented more serious problems. Three wells served visitors and resident staff. Though the water quality was still considered "safe," tests in 1989 had revealed that one of the wells was contaminated by trichloroethane from an unknown source. The well was taken out of service, and tests were performed on the remaining wells. But clearly another solution was needed.[90] In 1991 the park, together with four neighboring communities, commissioned an engineering report to assess the cost of extending Oyster Bay's water system.[91] The following year the Oyster Bay Water District formally asked the National Park Service to participate in the extension, and park staff prepared a $500,000 project statement for the purpose.[92] In 1999, the park's internal water distribution system was studied, in particular the service to Gray Cottage, Old Orchard Museum, and the Maintenance/Foreman's Cottage; improvements were coupled to the primary contract. Other difficulties had to be solved. Was it legal for the Park Service to transfer ownership of the site's water distribution system to the Oyster Bay Water District? It was. In 2000, the Institute for Long Island Archaeology surveyed the proposed route for archeological resources,[93] and construction began late that year.[94]

As boundary conditions and the construction of utilities occupied the attention of park managers, staff members were also discovering new environmental values in the estate's landscape. True, its vegetation, animal species, aquatic, air, or geological resources could not claim Level One status under service-wide inventory and monitoring standards. But the 1992 *Resource Management Plan* called for reassessment of its aesthetic resources of woodland, open space, and water.[95] And the park's variety of habitats – successional woodland, beach, salt marsh, glacial pond – could well support an environmental education program. The problem (as agency planners had recognized as

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[89] Chief of Visitor Services and Chief of Museum Services, *Resource Management Plan*, p. 42.

[90] Chief of Visitor Services and Chief of Museum Services, *Resource Management Plan*, pp. 13, 32.

[91] Holzmacher, McLendon & Murrell, PC, "Engineering Report for the Proposed Cove Neck – Oyster Bay Cove Extension," July, 1991; SAHI: CRBIB, Box No. 4. The NPS paid $7,500, or half the cost; the local communities, including Cove Neck, paid the remainder. The extension required to reach Sagamore Hill was about 1.7 miles.

[92] Chief of Visitor Services and Chief of Museum Services, *Resource Management Plan*, pp. 13, 32.

[93] Institute for Long Island Archaeology, "Exploratory Archaeological Investigation at the Sagamore Hill NHS" and "Stage 1B: Archaeological Survey for the Proposed Water Main at the Sagamore Hill NHS," both June 2000; CRBIB Box 7.

[94] [Diane Dayson], "Briefing Report," July 6, 2000; Harpers Ferry Center, SAHI Box: Misc.

[95] Chief of Visitor Services and Chief of Museum Services, *Resource Management Plan*, *passim*.

early as 1970)[96] was the almost complete lack of information about these resources. The *Resource Management Plan* called for baseline studies, and presented project proposals for a natural resource management plan. This plan would include maintenance guidelines and staffing recommendations. It would also call for decisive actions to halt the intrusion of nonnative plants into woods and fields, to rehabilite the nature trail, and to develop a use plan for the Natural Environmental Study Area, which had "tremendous educational potential" but was "vastly underused." More must be done – much more – it concluded, to protect the park's environmental resources.[97]

The Growth of Cultural Landscape Studies in the NPS

If factors other than historical appreciation were combining to focus attention on the landscape during the early 1990s, the National Park Service as an agency was also devoting increasing resources to understanding and managing landscapes as cultural artifacts, and this trend would be decisive at Sagamore Hill. David Grayson Allen has described how, under pressure from advocates outside the agency, the field of cultural landscape preservation took root in the Park Service.[98] A key event was the publication in 1984 of landscape architect Robert Z. Melnick's study *Cultural Landscapes: Rural Historic Districts in the National Park Service*, which provided (in Allen's words) "the first real technical guidance for use in preserving the landscape." It also introduced the concept of the cultural landscape report as a single document covering the identification, evaluation, and recommended treatments for landscapes. In 1985, the agency's Cultural Resources Division launched a "landscape initiative." This was intended as much to head off, as to support, calls for more attention to the discipline, but advocates continued to press the agency. In 1987, the agency's management policies for the first time contained a discussion of the treatment and management of cultural landscapes, and the 1992 edition of the NPS's *Cultural Resource Management Guideline* (*NPS-28*) included a chapter on the subject, including standards for cultural landscape reports.

Much of the agency's work on cultural landscapes in the late 1980s was aimed at helping those outside the agency to identify and manage their significant landscapes, rather than addressing the problems of the NPS's own parks. In 1990, however, the North Atlantic Region established its own Cultural Landscape Program, and the

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[96] "To date very little solid research has been undertaken to classify and to identify species of flora, fauna, habitat, and life zones.... [R]esearch seems essential to quality interpretation." (*Interpretive Prospectus: Sagamore Hill National Historic Site, New York*, U.S. DOI, NPS, 1970; pp. 19-20).

[97] Chief of Visitor Services and Chief of Museum Services, *Resource Management Plan*, esp. pp. 24, 37.

[98] The following account is drawn from David G. Allen, *The Olmsted National Historic Site and the Growth of Historic Landscape Preservation, Administrative History, Frederick Law Olmsted National Historic Site* (final draft, March 1998), esp. Chapters 7 and 10.

program quickly became active in research, treatment, and training projects for parks and historic sites. The following year, the region launched the Olmsted Center for Landscape Preservation, a partnership between the region's Cultural Landscape Program and the Olmsted National Historic Site. The Olmsted Center intended specifically to offer technical assistance to parks, and within a year it had participated in 25 technical-assistance projects in 20 of the region's parks, including park maintenance plans, cyclic landscape maintenance, and historic landscape assessments. By 1993, it had merged with the region's Cultural Landscape Program. Together, they would play an important role at Sagamore Hill, beginning with the preparation of a cultural landscape report.

The Cultural Landscape Report

Begun in 1991, the *Cultural Landscape Report* was one of three prepared as part of a pilot program, under a cooperative agreement between the National Park Service and the State University of New York at Syracuse, which had a strong program in landscape design. The research and writing were done by graduate students under faculty supervision, with overview and assistance from Olmsted Center and park staff. It was published in two volumes: a description and historical analysis in 1995, and a treatment plan in 1998.

The *Cultural Landscape Report* considered practical questions of park management – boundary issues, parking, visitor circulation – as well as the landscape's historical shape and significance. It proclaimed a single overriding goal: to restore the sense of Sagamore Hill as a "working farm" or "vernacular" landscape (Fig. 35) that included "pastures, woodlands, meadows, open lawns with scattered trees, an orchard, and a flower and vegetable garden."[99] The report proposed to restore the farm's feeling and configuration by clearing former agricultural fields of their intrusive vegetation, moving the staff quarters out of the New Barn and interpreting it as part of the working landscape, removing later shrubs and formal plantings that conveyed a "false image of ornamentation that never existed,"[100] and preserving or recreating post and rail fences.

The *Cultural Landscape Report* represented a decisive shift from prevailing landscape management and interpretive practices at Sagamore Hill. To the extent that the landscape had figured in the park's interpretation, it was as a backdrop to Roosevelt family life. Now, the *Cultural Landscape Report* pointed out that the landscape could contribute significantly to the park's interpretation, and through practical proposals

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[99] Regina M. Bellavia and George W. Curry, *Cultural Landscape Report for Sagamore Hill National Historic Site*, Vol. 1: Site History, Existing Conditions, and Analysis (Boston, MA: U.S. DOI, NPS, Northeast Region, Olmsted Center for Landscape Preservation, July 1995), p. 23.

[100] Bellavia and Curry, *Cultural Landscape Report*, Vol. 1, p. 26.

ranging from small (removing shrubs, letting the grass grow) to ambitious (clearing woodlands, restoring the barn), it emphasized the interpretive significance of the working farm.

Whatever Sagamore Hill had once been, it was now a working park, and the *Cultural Landscape Report* considered how various landscape treatments would allow managers to harmonize the two realities. Borrowing language from the *Secretary of the Interior's Guidelines for the Treatment of Cultural Landscapes*, it argued that a strict *preservation* approach, limited to conserving things as they were, would limit managers' ability to adapt the park to practical needs – and to recreate once-important landscape features. *Restoration*, an approach focused on bringing things back to their original condition, was not quite right either: it would rule out essential features such as the parking lot and visitor center. *Reconstruction*, on the other hand, was hardly called for, since so many of Sagamore Hill's historic features survived intact, or nearly so. The authors of the *Cultural Landscape Report* recommended **rehabilitation** as the best solution: it offered a flexible approach to reclaiming lost or disappearing features, stabilizing current conditions where they were acceptable, maintaining modern interventions that were useful and necessary, and making further adaptations as circumstances might demand.[101] Rehabilitation is a technical term. In ordinary language, one might describe the *Cultural Landscape Report*'s approach as a pragmatic acceptance of changes that had taken place, coupled with a measured and patient determination to approach historical authenticity as far as might be practical. It did not differ in any fundamental way – as the authors pointed out – from the approach contained in the 1963 *Master Plan*. However, the earlier document had been more single-minded, perhaps more idealistic in its vision of a restored landscape: in the *Cultural Landscape Report*'s words, it had aimed at a "fairly aggressive, though selective, restoration." The new plan envisioned a gradual reversion of the landscape, or at least of major elements of it, towards its original character. The most sweeping changes were subtractive: clearing large areas of once-open fields that had reverted to forest, and removing ornamental plantings around the house. After clearing, fields would be planted to grass and put on a once- or twice-a-year mowing regimen to produce a rough and unmanicured look. Only later would the species be adjusted to clover, wildflowers, hay, or corn. The *Cultural Landscape Report* proposed a similar treatment of the lawn around the house: preserving historic trees, replacing others with more historically accurate species, but only when they declined or were damaged. Similarly with the pet cemetery arbor: the existing, historically inaccurate, benches should give way to more accurate furnishings, but only when their eventual

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[101] Bellavia and Uschold, *Cultural Landscape Report*, Vol. 2, pp. 7 ff. *NPS-28* is quoted as follows: "**Rehabilitation** improves the utility or function of a cultural landscape, through repair or alteration, to make possible an efficient compatible use while preserving those portions or features that are important to defining its significance" (p. 7).

decay necessitated replacement.[102] This was a plan whose achievement would require close attention over many years.

Sometimes the desired degree of historical accuracy could be attained without exactly replicating particular elements. In Roosevelt's time, the house had stood in an open lawn with scattered trees. Over the years, some trees had been removed, others planted. Landscape rehabilitation would aim to "convey the appearance of scattered trees on an open lawn, as was the case historically," without replicating the exact placement and species of trees. A similar approach could be applied to the orchard, one of the most disturbed areas of the estate. Though the presence of Old Orchard Museum would prevent full restoration of the trees, filling in the grid where possible and removing nonhistoric trees that interfered with the pattern would suffice to "recapture" the "overall extent and original concept" of the historic orchard. Similarly with the bridge over Eel Creek, the original bridge was long gone: the replacement was of a somewhat different character and materials, and was in a different location. When it came to the end of its useful life, it should be replaced by a more historically accurate version. Yet in the meantime it should be preserved because "In this case, the existence of a rustic wood bridge, crossing the creek is more important than the exact location and construction details."[103]

In taking this line, the *Cultural Landscape Report* assumed that the Eel Creek area was "rarely interpreted." The difference between the original and the current bridge would not "largely detract from the historic character of the site." Yet as the *Cultural Landscape Report* was being begun, park management and staff were increasingly focusing attention on the interpretive potential of just this part of the estate, particularly for environmental-education programs involving area schools. More than a mere nature walk, a hike to Eel Creek and the Natural Environmental Study Area would give people a sense of what Roosevelt had in mind when he set aside vast areas for conservation; it would enrich the park's interpretation of Roosevelt. Did the historical form and placement of the Eel Creek bridge matter in this emerging interpretive context? The *Cultural Landscape Report* did not really address the question. But in other ways, the planners were careful to respect the growing interest in interpreting the natural areas. For example, the *Cultural Landscape Report* ruled against moving the parking lot to the area around Old Orchard, because such a change, while removing a major intrusion from the core of the historic landscape, would detract from the park's natural areas.

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[102] Bellavia and Uschold, *Cultural Landscape Report*, Vol. 2, pp. 3, 24-25, 43.

[103] Bellavia and Uschold, *Cultural Landscape Report*, Vol. 2, pp. 21, 25, 34.

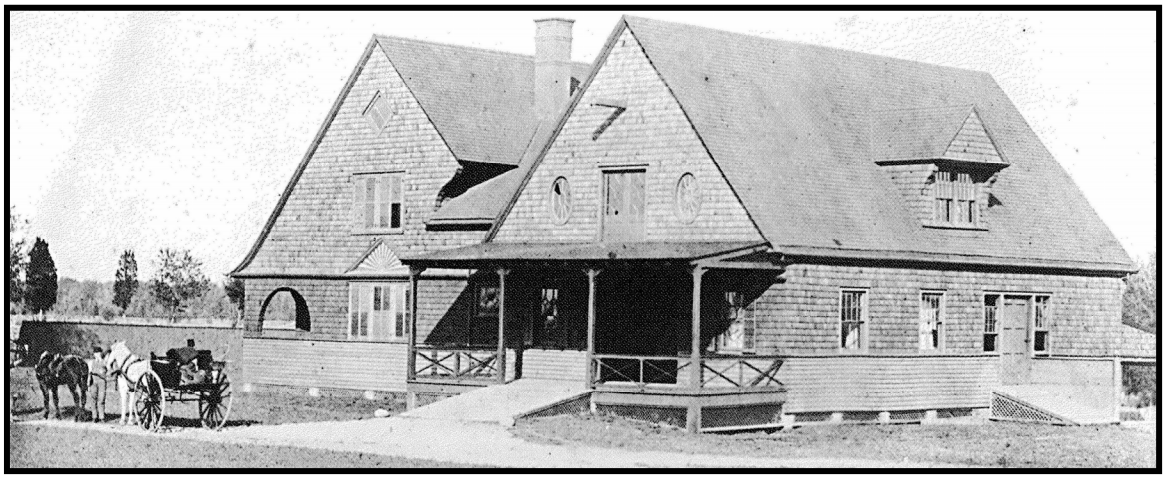

Fig. 35. (*Top*) an agricultural landscape at Sagamore Hill: the New Barn in 1907; *(above*) the Stable and Lodge, about 1885. (Courtesy Sagamore Hill NHS: nos. 113 and 112, Box 6: c.)

Old Orchard Reassessed

The *Cultural Landscape Report*'s attitude to Old Orchard itself was ambivalent. While accepting its continued presence as a practical matter, the report declared bluntly that the house and its attendant structures "do not contribute to the historic character of the site and, in fact, detract from that character" – a judgment supported by the concomitant determination that it was ineligible for listing on the National Register of Historic Places.[104]

This judgment represented a significant policy shift. When Old Orchard had been acquired, the agency's official position was that it was a historically valuable feature.[105] True, it would have been hard for agency officials to say anything else, given the importance of the Roosevelt family theme to the TRA and the prominence of Roosevelt family members as advisors. But after 1966, when passage of the National Historic Preservation Act forced park planners to make formal distinctions between historic and nonhistoric structures, they clung at first to their initial valuation, listing Old Orchard as a historic resource in 1973.[106] This proved to be a technical error – National Register rules required all but the most significant listed resources to be more than 50 years old – and the mistake was corrected by removing Old Orchard from a subsequent filing in 1978. The house cleared the 50-year threshold in 1987, and could easily now have been listed. But still the *Cultural Landscape Report* judged that it lacked historical significance: this time, the judgment had been carefully considered.

The shift reflected several trends. By 1995, Archibald and Ethel Roosevelt were long gone, and at least some park staffers were interested in moving the park's public interpretation away from the early absorption with the Roosevelt family. Meanwhile, the rise of social history had made farm workers seem more interesting than previously, at the same time as the disappearance of farms around Cove Neck was making their historical traces more valuable. Old Orchard's ability to represent the Roosevelt family's

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[104] Bellavia and Uschold, *Cultural Landscape Report*, Vol. 2, pp. 21-22. The judgment that Old Orchard was "non-contributing to the historic character of Sagamore Hill" and ineligible for National Register listing was made by the NPS List of Classified Structures, with the concurrence in 1996 of New York State's Office of Parks, Recreation and Historic Preservation. The *Cultural Landscape Report* (Vol. 1) claims that the 1963 *Master Plan* "calls for the removal" of Old Orchard and its accompanying structures, but this researcher found no evidence for that. For Old Orchard's continuing use, see also *Cultural Landscape Report*, Vol. 2, p. 48. For the National Register determination, see also letter, Superintendent, New England Support Office, Boston, Terry Savage, to Bernadette Castro (Commissioner, New York State Office of Parks, Recreation and Historic Preservation), March 4, 1996; Northeast Regional Office, Boston, History Program Files: National Register File.

[105] See, e.g., the 1961 "Area Investigation Report" and 1963 *Master Plan*.

[106] Draft National Register nomination form prepared by the New York office of the North Atlantic Region, January, 1973; Northeast Regional Office, Boston, History Program Files: National Register File. See Chapter 4.

history now seemed less valuable than previously, its intrusion into the original farming scene more problematic.

The Problem of Parking

If Old Orchard was an interpretive problem, the same could have been said with a great deal more force about the parking lot and concession building. They stood athwart the very center of the historic grounds, where flowers and vegetables had once grown as part of Roosevelt's working farm. They were unredeemed by any connection with the Roosevelt family. Yet here the *Cultural Landscape Report* adopted a tone of extreme circumspection, relegating the entire question of the parking lot and concession building to the "Additional Treatment Recommendations." Here the suggestion was made that "accommodation for parking should be made in a sensitive manner," but the report put off the whole issue for further consideration "within a comprehensive, or grand scheme, for the entire park." In the meantime, it proposed a conceptual plan for relocating the parking to the north side of the current access road: Smith's Field, the very area that the *Master Plan* had rejected. This proposal might be adopted "at such time when it may be possible," and at that time "restoration of the garden should be explored."[107]

The *Cultural Landscape Report's* hesitancy on this critical landscape question contrasted starkly with the clarity of the 1963 *Master Plan*. Labeling the parking lot and concession building as "serious intrusions upon several important historic features," the earlier document had stated unequivocally that they "will be removed and located outside the historic preservation [area]." Admittedly, no date was given for this, but that it would be done – and that the flower and vegetable gardens would be restored – was definitely stated. And those directions were contained in the single approved chapter.[108]

One may infer a number of explanations for the *Cultural Landscape Report's* lack of emphasis on what had once been such a pressing matter. Without the Emlen Roosevelt property, which the Park Service had failed to acquire in 1963, the site proposed by the *Master Plan* for a new parking lot and visitor center was unavailable. And without it, the agency's options were limited, particularly as growing appreciation of

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[107] Bellavia and Uschold, *Cultural Landscape Report*, vol. 2, 1998, p. 49.

[108] The relevant passages are as follows: (1) "The existing parking area and canteen shop, because they are deemed serious intrusions upon several important historic features, will be removed and located outside the historic preservation [area]." (2) "Physical facilities necessary for visitor use and site operations will be located and designed so as to preserve and maintain the integrity and character of the historic setting." (3) "Eventual relocation of the present necessary parking area and concession facilities shall be effected in connection with future grounds restoration." Restoration of the gardens was listed as one of nine development objectives that "will be accomplished" to recreate the estate's appearance. All *Package Master Plan*, pp. 1, 13, and August-September version, vol. I, chap. 1, p. 6. See also p. 15, "Historical Base Map," and "Vegetative Treatment Plan," where the garden area is identified as "To Be Restored."

the natural area around Old Orchard created resistance to placing them there. Meanwhile, standards had changed within the field of cultural landscape management. Designers were now less quick to propose drastic treatments, less inclined to wholesale re-creation, and more willing to see value in continuity and in the accretion of features. Another reason probably has to do with changing political expectations. By the late 1990s, decades of budget cutbacks in Washington had led to a climate of caution with regard to large-scale undertakings. Certainly the fact that the agency had so recently invested funds in rehabilitating the concession building, and had signed a new concession contract, would have argued against too-great enthusiasm for demolishing or even moving it. Then, too, sensitivity to the park's wealthy and powerful neighbors inhibited planners from placing a parking lot along the estate's boundary – though in truth there seemed nowhere else to put it if it were not to remain where it was or be placed in the natural area beyond Old Orchard. But to David Uschold, one of the report's authors, the explanation was simple, at least in retrospect: though he believed the new document was consistent with the *Master Plan*, major changes called for in the earlier document like relocating the parking lot or building a new visitor center were "beyond the scope of the *Cultural Landscape Report*": they "required further research and planning." In the treatment portion of the *Cultural Landscape Report*, he explains, "We were trying to capture elements of landscape treatment that could be accomplished by the park," and so it focused on "tasks they could complete with current staff or with limited funds." In any case, the *Cultural Landscape Report* placed notably little emphasis on what had been core issues for the *Master Plan*.[109]

Reconstructions in Theory and Practice

There were other points of divergence between the *Master Plan* and the *Cultural Landscape Report*. One concerned the Stable and Lodge (Fig. 35). The *Master Plan* had urged reconstruction of this vanished but once-important feature of the estate landscape; indeed the building was a key element in its vision of a restored landscape.[110] The *Cultural Landscape Report* rejected reconstruction, calling instead for preserving its foundations within a new visitor center. And far from highlighting the Stable and Lodge, the *Cultural Landscape Report* treated its future as a relatively unimportant issue, relegating it to the "Additional Treatment Recommendations."

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[109] E-mail, David Uschold to Paul Weinbaum, March 20, 2006 (forwarded to this author with Uschold's approval).

[110] *Package Master Plan*, p. 13. The approved chapter calls for consideration of "marking or partial or complete reconstruction" of this as well as other missing features (June-September version, Vol. I, Chap. 1, p. 6).

To understand this new direction, one has first to consider the history of changing NPS policies on reconstruction, which the agency defined as the replication of vanished buildings or features. The NPS reconstructed many buildings, and Michael James Kelleher's recent study of the subject points to the examples of Bent's Old Fort (CO), Fort Stanwix (NY), and Fort Union Trading Post (ND & MT).[111] Park officials defended reconstruction as a valuable aid to interpretation, a core NPS mission. But as a matter of policy, even in 1963, the agency preferred preservation and restoration, and by 1968, NPS policy was restricting the conditions under which reconstructions were allowed; they would be further tightened in 1975.[112]

It was during the 1970s that the Park Service had adopted what some officials called a "new ethical standard" that elevated the evidentiary value of the accurate preservation of historical remains above the interpretive value of their reconstruction.[113] At the end of the decade, two regional Chief Historians – Richard Sellars from the Southwest Region, and Dwight Pitcaithley from the North Atlantic Region – wrote what Kelleher calls "one of the strongest, if not the strongest, statements against reconstructions made within the Park Service since the issue was first considered by the agency in the 1930s."[114] Reconstructions, they claimed, were not authentic; they destroyed genuine resources, watered down the stock of real historic buildings, and competed with them for maintenance funds. In its penchant for reconstructions, argued Sellars and Pitcaithley, the Park Service lagged behind the rest of the historic preservation field.

Events and policies at Sagamore Hill mirrored these shifts. Written in 1963, the *Master Plan* called for reconstructing the Stable and Lodge as well as the windmill. The latter was actually completed by 1972, though it is clear that the main impetus came from

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[111] Michael James Kelleher, "Making History: Reconstructing Historic Structures in the National Park System," M. S. Thesis, University of Pennsylvania, 1998.

[112] Kelleher, "Making History," pp. 10-11, 73-74. The 1968 policy required that, for reconstruction to be allowable, almost all traces of a structure must have disappeared; its recreation must be essential for public understanding of the park's fundamental historical and cultural associations; sufficient data must exist to permit an accurate reconstruction; and the structure can be rebuilt on the original site or in a setting appropriate to the area's significance." (Quoted by Kelleher from NPS, *Compilation of the Administrative Policies of the Historical Areas of the National Park System*, 1968, p. 23.) The 1975 policy required that no significant preservable remains will be obliterated by reconstruction; that data are sufficient to permit an accurate reproduction with a minimum of conjecture; that the structure can be built on the original site; that all prudent and feasible alternatives to reconstruction have been considered; and that it be demonstrated that reconstruction is the only alternative that permits and is essential to public understanding of the park's historical and cultural associations. (Quoted by Kelleher from Barry Mackintosh, "To Reconstruct or Not to Reconstruct: An Overview of NPS Policy and Practice," *CRM Bulletin* 13, no. 1, 1990, p. 7).

[113] Kelleher, "Making History", pp. 94-95. The phrase is quoted from William Hunt, an NPS archaeologist.

[114] Kelleher, "Making History", p. 96.

the Theodore Roosevelt Association, rather than from the agency. The *Cultural Landscape Report* called the reconstruction "historically accurate," but this was not entirely true. It proved impossible to create a working replica of the original wooden vanes, which were both large and heavy, and so a smaller, lightweight metal replacement was chosen.[115] After the windmill project, policy changed decisively. Noting plans on the books to reconstruct the Stable and Lodge, the 1975 *Historic Resource Management Plan* concluded that "current National Park Service policy concerning reconstructions appears to preclude" it.[116] Planning documents of 1977 and 1980 said much the same thing.[117] The 1998 *Cultural Landscape Report* drove the nail into the coffin. By then, Pitcaithley had become the Park Service's Chief Historian, while Sellars' 1997 book *Preserving Nature in the National Parks: A History* was becoming a seminal source of guidance for NPS professionals. Both men had continued their critique of reconstructions. In 1997, Sellars had organized a course for park managers at the agency's Mather Training Center, at which both he and Pitcaithley spoke.[118] By 1998, then, the question of reconstructions had been reframed in terms that would have made it very difficult to defend a proposal to reconstruct the Stable and Lodge.

Still, there were subtleties, and even contradictions. While NPS policy frowned on reconstructions, the agency continued to approve them where political pressure gave force to a good argument: a plan to reconstruct one of the barracks at the Tuskeegee Airmen National Historic Site near Atlanta was under discussion as this study was written. In situations like these, planners might easily become absorbed in the fine distinctions between a reconstruction and a new building that looks very similar to a vanished historic structure. This distinction now became important at Sagamore Hill.

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[115] For TRA influence on the project and its final form, see memoranda, Henry G. Schmidt to Director, Eastern Service Center, October 5, 1970; Frank Barnes to Director, Northeast Region, January 8, 1971; and George Lucko to Acting Superintendent, Fire Island & NYC Group, April 13, 1971; all NPS Library, Washington, D.C. Also, Jerry Wagers to Director, Northeast Region, September 24, 1970; James T. Wolfe to Director, Northeast Region, December 23, 1970; and letter, Conrad Wirth to Jerry Wagers, December 21, 1970. For comments in *Cultural Landscape Report,* see Bellavia and Uschold, *Cultural Landscape Report*, Vol. 2, p. 19.

[116] J. Brown, J. DeMarce, and P. Steele, *Historic Resources Management Plan, Sagamore Hill (*U.S. DOI, NPS, December 1975), p. 43.

[117] "Outline of Planning Requirements," May 20, 1977 (but unsigned and therefore possibly a draft) says "It now appears that these two major proposals [i.e. reconstructions of historic structures and construction of a visitor center] are not in harmony with current NPS policy." *Statement for Management*, approved January 7, 1980, p. 9, calls for reconsidering the project "in light of current NPS policy."

[118] Kelleher, "Making History," pp. 107-108.

The Visitor Center from a Landscape Perspective

The 1963 *Master Plan* had not specified a function for the reconstructed Stable and Lodge, but it implied that it would be compatible with the plan's vision of a recreated agricultural landscape.[119] We can be certain that it would not have been a visitor center, since a new one was to be built next to the relocated parking lot. But by 1998 no such building had been built, and the visitor center question continued to loom large for agency planners. The *Cultural Landscape Report* dismissed the rehabilitated concession building as inadequate, and stated that it detracted from the landscape. A proper visitor center would have to be provided, and this raised issues every bit as difficult as those that had confronted the authors of the *Master Plan*, since NPS policy now required all new buildings within historic settings to be designed and sited so as to "preserve the integrity and character of the area." This was a hard standard to meet within the core of Sagamore Hill's landscape. Steering carefully, therefore, between the twin perils of new construction and reconstruction, the *Cultural Landscape Report* called for a new visitor center in the same shape and location as the vanished Stable and Lodge. It would be "an identifiably new construction," yet would "mimic" the old Stable and Lodge in mass and scale. It might be ever so slightly larger than the old building – perhaps 10 per cent – which would allow the original foundations to remain undisturbed within their new shell. In short, it would be a near replica, but it would not be a reconstruction.[120]

In many ways, this was an ingenious solution and a clever response to multiple policy requirements. From the perspective of landscape management it made good sense. It replaced the vanished architectural mass with a closely similar one at the same location, thereby reconstituting the general sense and spatial organization of the landscape – an important goal of landscape rehabilitation. Yet from the standpoint of historic preservation it was more perplexing. It mirrored a widespread ambivalence within the field about how to design for historic contexts. On the one hand, many preservation architects argued that, for the sake of honesty, new buildings should look like what they were: new buildings. On the other, preservationists as well as park managers were focusing increasingly on the integrity of urban and landscape settings, and they argued that new buildings should fit into their contexts. They should therefore look like what they were not: *old* buildings. Desiring to defend the special value of original artifacts from competition by well-executed fakes, many preservationists

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[119] "Operation of the area to suggest the farming and outdoor activities Theodore Roosevelt engaged in shall be considered as part of the preservation and restoration complex." (*Master Plan*, August-September version, vol. 1, chap. 1, p. 6 [approved chapter]). The June version contemplates the possibility that "milk cows or other domestic stock" might in future be introduced. (Vol. III, section E, p. 2).

[120] Bellavia and Uschold, *Cultural Landscape Report*, Vol. 2, pp. 45-47.

resolved this contradiction by arguing that new buildings should look old, yet should be distinguished from the *real* old buildings by subtle differences in materials or detailing. Essentially this was the solution adopted by many painting restorers, who distinguished their in-painting from the original artwork by hatching or some other form of differentiation, and it was essentially the solution now proposed in the *Cultural Landscape Report.*[121]

But there were other issues to consider: one was archeology. The discipline's growing prominence – boosted in part by environmental compliance requirements such as those that had accompanied the digging for water and electric lines at Sagamore Hill – was giving new emphasis to the value of remains, such as old foundations, that might once have been built upon without a second thought. From an archeological point of view, scaling up the almost-reconstructed Stable and Lodge so as to avoid disturbing the old foundations made sense. However, it introduced a questionable note from preservation standpoint, and even more so from an architectural design perspective, since such up-scaling might throw proportions off and create a misleading and uncomfortable sense of scale.

These trade-offs were complicated: losses in some areas seemed to be compensated by gains in others. Yet in the area of interpretation, the new proposal threatened to create a serious problem that could not be counterbalanced elsewhere. The *Cultural Landscape Report* aimed to restore Sagamore Hill's farming character, and to achieve this goal, it proposed to remove not only modern plantings but also modern *uses* from the historic remains of the farm. To interpret the New Barn as part of the agricultural scene, for example, the *Cultural Landscape Report* recommended extracting and relocating the staff quarters that were located there.[122] Yet the same report now proposed to insert an obtrusively modern use – a visitor center – into a near-replica of the Stable and Lodge. If, as a NPS study had found, most park visitors had great difficulty distinguishing replicas from original buildings,[123] could they be expected to distinguish between a near-replica and a replica? True, the *Cultural Landscape Report's* plan restored the visual organization of the park's layout, and it solved the practical problem of the visitor center. However, it handed park interpreters the difficult challenge of explaining a farm landscape that contained a discordantly modern use at its very core.

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[121] This discussion of preservation attitudes is drawn from the author's own experiences working as a preservationist with numerous architects in New York City during the period from about 1989 through 2000.

[122] Bellavia and Uschold, *Cultural Landscape Report*, Vol. 2, p. 48.

[123] Kelleher, "Making History," p. 110.

One final aspect of Roosevelt's landscape presented a particular challenge to the authors of the *Cultural Landscape Report*: the glorious views that Roosevelt had enjoyed of Cove Neck Harbor and Oyster Bay (Fig. 36). The "Area Investigation Report" of 1961 had called for a "vista study" to assess the feasibility of reopening the view to Oyster Bay.[124] To facilitate reestablishing lost views, the *Master Plan* had proposed acquiring a buffer zone along the estate's border. The 1984 Land Use Plan had proposed scenic easements. But nothing had been done. Over time, the adjoining estates were developed, fields returned to forest, and the chance to recapture lost views vanished. The *Cultural Landscape Report* proposed to reestablish many important views *within* the park, but it renounced all hope of recapturing those *from* the park. In this, it was simply bowing to reality.

Managing the Landscape

The *Cultural Landscape Report* put forth a vision and a plan for Sagamore Hill's landscape. The question was: how would that vision be achieved? In some ways, the process of implementation resembled that of the Furnishing Plan; in other ways, it differed. As the refurnishing plan had done, the *Cultural Landscape Report* triggered many small but concrete actions, and these added up to larger changes in the landscape's appearance. Trees were a major point of focus. By 1996, the Olmsted Center and Arnold Arboretum were helping to propagate historically important examples.[125] The mid-1990s on Long Island saw a serious infestation of gypsy moths; help was sought from the U.S.

Forest Service. But in general the emphasis was on removal. George Dziomba and Willy Stein describe how, after faltering in the 1980s, the campaign to cut back invasive and nonhistoric trees was taken up again after the arrival of Superintendent Martinez and Chief of Maintenance Johnson.[126] In 1991, arborists from the Long Island Arboricultural Association removed eight trees near the Theodore Roosevelt House that were identified as hazards.[127] In 1996 the Olmsted Center and Northeast Field Area staff spent a week pruning dead, dying, or badly overgrown trees.

The biggest change came in 1999. Superintendent Martinez had developed a strong relationship with Town Supervisor Venditto of Oyster Bay, who offered to loan Martinez the use of the town's tree-maintenance crew. Amy Verone had discovered

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[124] Coryell, Failor, and Shedd, "Area Investigation Report", p. 21.

[125] Memorandum, Martinez to Manager, Olmsted Center for Landscape Preservation, September 4, 1996, with attached FY97 Request for Technical Assistance from the Olmsted Center; SAHI: Central Files, D 2621.

[126] Recorded interviews with author, December 7, 2004.

[127] Chief of Visitor Services and Chief of Museum Services, *Resource Management Plan*, pp. 5, 11.

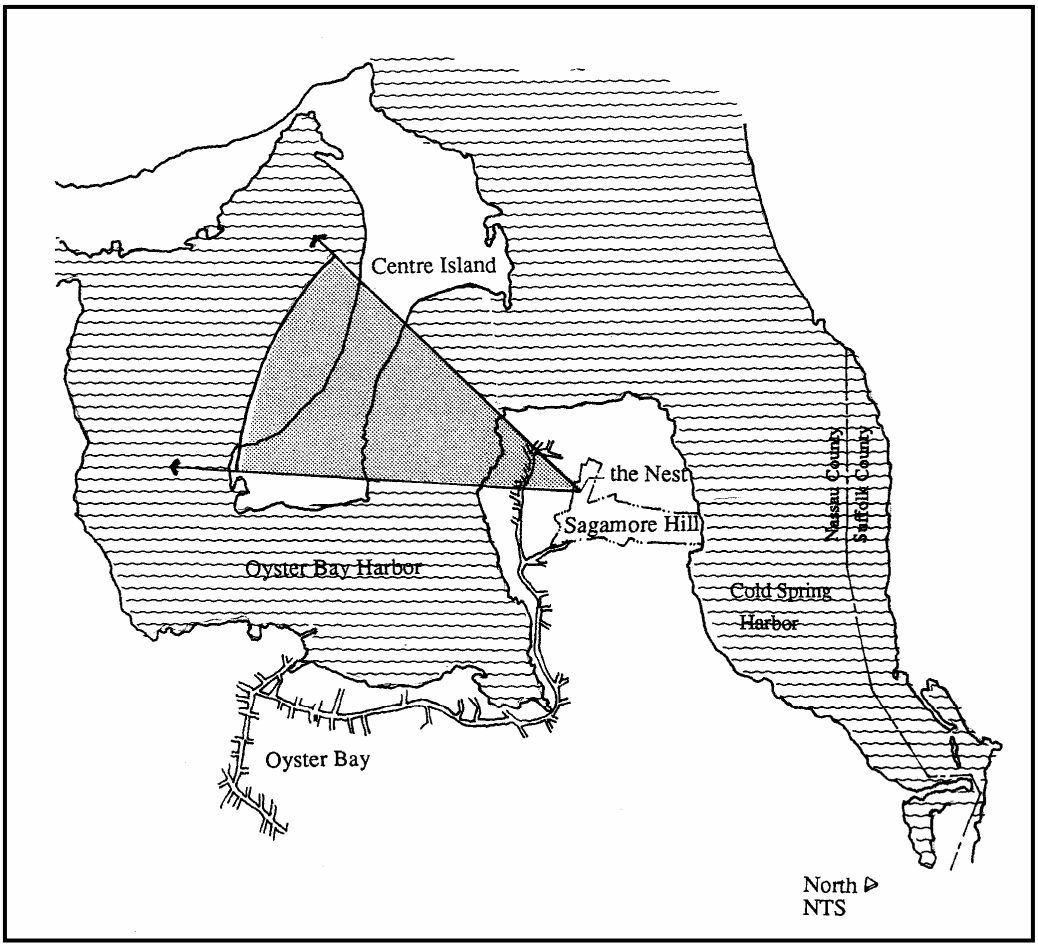

Fig. 36. A historically significant view, as documented in the *Cultural Landscape Report*: that from the Nest, Mrs. Roosevelt's garden gazebo. (Courtesy Sagamore Hill NHS; reprinted from Bellavia and Curry, *Cultural Landscape Report,* Vol. 1).

some old film footage of Theodore Roosevelt standing on the porch, and it clearly showed an open, sweeping lawn – not the thicket of trees that greeted visitors in 1999. Martinez would use the borrowed crew to clear the trees and return the west lawn to its original openness, which was consistent with the *Cultural Landscape Report*. Venditto was ready to put his crew to work right away: in fact, he told Martinez he had to make up his mind immediately because the crew had a two-day window before they had to move on to other work. Martinez authorized the work immediately. In two days, the Oyster Bay crew cleared more than 100 trees. Martinez estimated the value of their work at $100,000.[128]

Boundaries and trails provided another point of focus. In 1995 and again in 1996 the park requested One-Year Funding to survey and mark the boundaries, rebuild split

[128] Vidal Martinez, recorded interview with author, January 14, 2005.

rail fences, and rehabilitate the nature and carriage trails, both of which were eroded and overgrown. After the publication of the *Cultural Landscape Report*'s Treatment Recommendations in 1998, the park was able to use Fee Demonstration funds to begin addressing the backlog of landscape preservation projects, including replacing split-rail fences, clearing the original carriage road, and establishing a walking trail south of the Theodore Roosevelt Home.

Without proper ongoing maintenance, efforts at landscape restoration would have limited value, and so in 1997 the Olmsted Center produced a *Landscape Preservation Maintenance Plan – A Field Manual* for the care of "significant historic plants, lawns, meadow, pasture and fields," including "potentially historic" trees. The guide included a detailed inventory of trees and other landscape features, plus copious information on each species of tree represented at the park and on pruning techniques. It was conveniently designed to be carried about the park and used on the spot.[129] But its impact was hard to judge. Maintenance Mechanic Stein believes the *Cultural Landscape Report* and the manual "really didn't change things that much." The manual was helpful to the extent that it was used but, he says, Chief of Maintenance Roger Johnson did not wholeheartedly adopt it.[130]

One concrete step towards landscape rehabilitation owed little directly to the *Cultural Landscape Report*, though much to the Olmsted Center. In 1993, Monsanto (manufacture of the herbicide Roundup) sponsored a competition in which school children would vote for their favorite presidential house. The prize was a $20,000 gift for landscape improvement. Sagamore Hill won, outstripping shrines like Mount Vernon and Monticello: the children, recalls Martinez, liked the fact that Roosevelt was a cowboy, and that he did not own slaves.[131] Partly on the strength of the children's interest in the old tennis courts, and partly on the recommendation of the Olmsted Center, Martinez decided to use the money to reopen the old carriage drive as a nature trail, and to clear the tennis courts.

All in all, despite these changes, the future of Sagamore Hill's landscape remained in doubt, for several reasons. Decisions made in the 1960s had constrained the agency's options and left it without a clear direction when it might still have been possible to take decisive action towards restoring the historic landscape. Then, even while calling for rehabilitation of Roosevelt's working farm, the *Cultural Landscape Report* seemed relatively uninterested in large-scale changes such as restoring the gardens or removing the parking lot, focusing instead on tasks that the park could complete within its existing

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[129] *Landscape Preservation Maintenance Plan: SAHI – Field Manual*, Olmsted Center for Landscape Preservation, October 1997; SAHI: CRBIB, Box No. 5 and 10.

[130] Willy R. Stein, recorded interview with author, December 7, 2004.

[131] Martinez, recorded interview with author, January 14, 2005.

resources of staff and money. In this, the *Cultural Landscape Report* exemplified the climate of lowered expectations produced by years of government budget-cutting. Its power to effect change, moreover, was further limited by the fact that, unlike the *Historic Furnishing Report* (which was approved by the regional director and brought funding with it, including the resources of the Harpers Ferry Center), the *Cultural Landscape Report* was not an official policy document but simply a research report. It underwent no formal review process, received no formal approval, and brought no funding with it. It was merely advisory, and staff did not have to follow its recommendations: indeed, Stein says that Johnson was fond of pointing this out to justify his lack of interest in following it. The *Historic Furnishings Report* carried a number of subsidiary initiatives on its back, but because of these limitations, the *Cultural Landscape Report* lacked the ability to do this. That is, it did not empower officials to argue that such and such an expenditure or action was called for by an officially adopted plan, nor did it give park staff the resources to carry out its recommendations.

THE INTERPRETIVE FRONTIER, AND THE ROAD AHEAD

Between the middle of the 1980s and the end of the 1990s, key aspects of Sagamore Hill had undergone a dramatic evolution. The landscape, if far from fully resolved, was now once again a focus of attention. Utilities had been replaced, boundaries marked, small estate structures rehabilitated. A long-standing concession contract had been overturned and a fine bookstore provided; an equally long-standing desire for a visitor center had been at least partially satisfied. A change of paint color had dramatically altered the long-settled appearance of the Theodore Roosevelt House. Inside, the changes were more subtle, yet more far-reaching. Every room in the house had been carefully rearranged. New objects had been bought, old ones moved or removed. The management of the park's vast collections had been thoroughly professionalized.

All of these were quite tangible changes. The evolution of Sagamore Hill's interpretive story brought further changes that, although in some cases less tangible, were of central importance.

The Sagamore Hill Story

As the 1990s opened, Sagamore Hill continued to present much the same interpretive picture as had been sketched out almost 30 years earlier. Yet the accepted formula was softening around the edges. The refurnishing project had made both the

old guidebook and Mrs. Derby's Acoustiguide tape obsolete, and though John Gable questioned the wisdom of discarding them,[132] the changes went forward.

Other parts of the interpretive machinery were also aging. The park's brochure was more than 20 years old; it predated the NPS's system-wide "uni-grid" design. In 1988, the park's *Operations Evaluation* recommended updating and redesigning it. Five years later, the new tour policy made it not merely obsolete but misleading. Still, it took until 1997 for a new brochure to become available. Three years later a new illustrated guidebook replaced Hagedorn's and Roth's 1997 guide, which was out-of-print. It was very different from its predecessor: a slender, glossy pamphlet that featured a wealth of color illustrations in place of Hagedorn's expansive text. The new guidebook was not so much a book *about* Sagamore Hill as an illustrated walk through it, a souvenir of what the visitor could see on a guided tour. Compared with its predecessor, the new guidebook's impact on the Sagamore Hill story was more to shrink it than change it.

Growing interest in the landscape stimulated other changes. As early as 1987, a series of wayside exhibits had interpreted the landscape to visitors, and in 1993 the Harpers Ferry Center (HFC) expanded the series with new exhibits for the old tennis courts and carriage road, then undergoing restoration. Two years later, HFC exhibit planners prepared a fuller wayside exhibit plan – although this was still a stop-gap until the *Cultural Landscape Report* could be completed, the landscape restored, and an entirely new series of wayside exhibits installed. In the meantime, new waysides would interpret the estate's "farm and country landscape,"[133] as well as Old Orchard. These would at least help visitors get around the park and understand what they were seeing.

Beyond affecting its interpretive machinery, growing awareness of the landscape was reshaping park interpretation at a more basic level. The 1992 *Resource Management Plan* pointed out (with a nod towards social history) that the park provides opportunities to "examine upper-class life in the late 19th-early 20th century, including the operation of a country estate and the relations between family and servants."[134] It also pointed out that Sagamore Hill occupied a "unique place in the conservation history of the United States." Its Natural Environmental Study Area provided an excellent opportunity to illustrate Roosevelt's contribution to the early conservation movement. No longer would Sagamore Hill be content to interpret the "life of the Roosevelt family": the park

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[132] Letter, Gable to Martinez, November 18, 1991; SAHI Curatorial Files, Folder: Refurnishing Project.

[133] The 1995 wayside exhibit plan called for other changes such as moving the bulletin board by parking lot, replacing the two orientation panels that were located there with a single new one, replacing a vandalized panel, and relocating three existing exhibits. Michelle Jacques, *Sagamore Hill National Historic Site Wayside Exhibit Proposal*, NPS, Harpers Ferry Center, Division of Wayside Exhibits, July 25, 1995, and *Sagamore Hill National Historic Site Wayside Exhibit Plan*, NPS, Harpers Ferry Center, Division of Wayside Exhibits, November 8, 1995; both SAHI: Central Files, Folder: D62).

[134] Chief of Visitor Services and Chief of Museum Services, *Resource Management Plan*, p. 1.

would now "perpetuate Theodore Roosevelt's concern for the natural world" by managing and interpreting its own natural resources.[135]

Environmental education had a troubled history at Sagamore Hill. It had been a focus of NPS interest at the end of the 1960s, yet the park's environmental programs had met with scant support from the TRA. Such programs at its sister site, the Birthplace in New York City, had contributed to precipitating a bitter and damaging feud. Nevertheless, the idea had gradually resurfaced. By 1988, Sagamore Hill had a cooperative agreement with the nearby Theodore Roosevelt Bird Sanctuary (which operated as a chapter of the Audubon Society), under which the sanctuary used the grounds of Sagamore Hill for educational programs.[136] And immediately upon arriving in 1991, Superintendent Martinez announced his desire to focus on Roosevelt's "environment and conservation interests." Perhaps, he told a reporter, "we can develop programs to educate the youth about the significant impact he had on the development of the country."[137] By the summer of 1995, with funds from the Parks as Classrooms grant program, the park had developed an environmental education program for middle-school students from Long Island and New York City. It followed the model of the 1972 program: that is, it would "train the trainer" through a series of workshops. Park guides or volunteers would accompany the visiting classes, but their teachers would lead them. As with earlier environmental education ventures, park staff emphasized that the program "incorporates Theodore Roosevelt's philosophies and ideals on conservation and his impact on the National Park Service and the National Wildlife Refuge system."[138] In other words, it was consistent with the park's authorization and mission.

Old Orchard Museum

But it was Old Orchard Museum that presented the biggest opportunity for new interpretation. The exhibits there, installed by Harpers Ferry Center in 1966-67 and never significantly updated, were looking more than a little tired. Their content was outmoded; so was their physical presentation. The 1992 *Collection Management Plan* was severely critical. Many of the cases were "poorly designed with many objects and photographs exhibited too low for comfortable viewing." The labels were hard to read

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[135] Chief of Visitor Services and Chief of Museum Services, *Resource Management Plan*, pp. 24, 37.

[136] *Operations Evaluation*, November 1988.

[137] Bill Bleyer, "New Superintendent for Sagamore Hill," *Newsday*, January 4, 1991; clipping in SAHI Central Files, Folder K34.

[138] "Sagamore Hill NHS 1995 Parks as Classrooms Report" (cover letter dated May 9, 1996: SAHI: Central Files, Folder: K 1817). See also memorandums, grant applications, and news releases in SAHI: Interpretation Files, Folder: Parks in Classrooms Information.

and marred by typographic errors; many were damaged and in poor condition. The exhibits had "little continuity...and no apparent thematic or chronological transition" between cases or rooms. They relied too heavily on photographs, and displayed "little evidence of the rich and varied collection held by the park." Management was lax too: there was no schedule for cleaning or maintaining the displays. This depressing picture was matched by the condition of the building itself. "Shutters are rotting or missing, paint is peeling," wrote a historian visiting in 1998. It is "an embarrassment to the National Park Service," said another.[139]

Park staff had tried to fix these problems. A "10-238" form for new exhibits and audiovisual presentations, completed as early as 1983, had warned that without funding, the park would "continue operating with substandard interpretive media, with negative consequences for visitors." But the region gave the project a relatively low priority.[140] "The renovation of these exhibits has been bumped off the Harpers Ferry Center list nine times in the last 11 years," complained Roger Johnson and Amy Verone in 1996.[141] As for the building itself, some work had been done: new mortar joints in 1992, a new roof in 1994.[142] More had been urged.[143] Park staff warned that the problems were becoming critical because of a series of upcoming centennial events: Theodore Roosevelt's military service as a "Rough Rider" and his election as Governor of New York (1998), his election as Vice-President (2000), and his inauguration as President (2001).[144]

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[139] H.W. Brands, "Sagamore Hill National Historic Site Evaluation," September 1, 1998; Douglas Brinkley, "National Park Service – Organization of American Historians Report on Sagamore Hill; SAHI: Interpretation Files, Folder: Historians Conference.

[140] "10-238" form for new exhibits and audiovisual presentations, March and November, 1983; Federal Record Center, Waltham, MA, Acc 79-93 0003, Box 4, Folder: D18, SAHI-1984.

[141] "Project Directive: One Year Program," prepared August 26, 1996, attached to memorandum, Martinez to Superintendent, New England System Support Office, September 4, 1996; SAHI: Central Files, Folder: D2621.

[142] Memorandum, Historical Architect David Bittermann to Chief, CRC Management Division, October 23, 1991; SAHI: Curatorial Files, Folder: Refurnishing Project; "Sagamore Hill National Historic Site 1993 Annual Narrative Report"; SAHI Central Files, Folder: A 2621. The Section 106 application for the new roof is preserved in the History Program Files, Northeast Regional Office, Boston.

[143] In 1992, for example, foreseeing increasing public use of Old Orchard, park staff requested a structural analysis of the building; in 1994, $85,000 to upgrade the electrical systems and renovate the exhibition spaces (Chief of Visitor Services and Chief of Museum Services, *Resource Management Plan*, p. 53). Also Project Directives for FY 96, prepared September 27, 1994, attached to memorandum, Acting Superintendent Amy Verone to Chief, Engineering and Maintenance, New England System Support Office, August 18, 1995; SAHI Central Files, Folder: D 2621. The amounts requested were $25,000 for electrical work and $60,000 for the exhibit spaces.)

[144] Project Directive: One-Year-Program, prepared August 26, 1996.

Early in 1998, the Harpers Ferry Center notified the park that $327,000 had been approved for new exhibits at Old Orchard.[145] The exhibits were to be ready for the inauguration centennial in 2001. In the meantime, using an existing cooperative agreement with the Organization of American Historians,[146] park staff asked NPS Chief Historian Dwight Pitcaithley to authorize a historians' workshop at the park in order to develop a fresh approach for the exhibits.[147]

The Organization of American Historians chose four historians to participate: H.W. Brands (Center for Presidential Studies at Texas A&M), Natalie Naylor (Hofstra University), Barbara Franco (Historical Society of Washington, D.C.), and Douglas Brinckley (Eisenhower Center, University of New Orleans).[148] Almost immediately, however, politics intervened. Superintendent Martinez told the Organization of American Historians they would have to include John Gable in the group. "To exclude him from the team," Martinez wrote, "can be a political disaster for the National Park Service…." If he were included, he would need to be given an honorarium. It was done: Organization of American Historians Director John Dichtl promised to "welcome him aboard and generally smooth things."[149] The final group included Brands, Naylor, Brinckley, and Gable.

The conference took place in August 1998. Park staff asked the historians to assess the park's interpretive and museum needs, and specifically to address the question, "How does it relate to current scholarship and modern exhibit philosophies?"[150] A consensus emerged on several points.[151] The historians generally liked the tours of the house, but felt (as Brands put it) that they did not fully convey "why Sagamore Hill is important, and not simply interesting...." In Brinkley's words, "one leaves Sagamore Hill not really understanding why Theodore Roosevelt is considered a

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[145] [Diane Dayson], "Sagamore Hill National Historic Site Briefing Report," July 6, 2000, n.p.; Harpers Ferry Center, SAHI Box: Misc.

[146] "Agreement between the National Park Service and the Organization of American Historians 1443CA193013 (unsigned copy in SAHI, Interpretation Files, Folder: Historians Conference.

[147] E-mail, Park Ranger Michael Shaver to Pitcaithley, April 18, 1998; NPS Library, Folder: Correspondence 1975 –. Also Project Agreement, Exhibit Planning, Design, and Production, Sagamore Hill NHS: Old Orchard Museum, June 30, 1998; SAHI: Interpretation Files, Folder: HFC Exhibit Plans.

[148] E-mail, Dichtl to Martinez, August 3, 1998; SAHI: Interpretation Files, Folder: Historians Conference.

[149] E-mails, Martinez to Dichtl and Dichtl to Martinez, August 5, 1998; SAHI: Interpretation Files, Folder: Historians Conference.

[150] Program, August 24-25, 1998; SAHI: Interpretation Files, Folder: Historians Conference.

[151] For the following, see: H.W. Brands, "Sagamore Hill National Historic Site Evaluation," September 1, 1998; letter, Natalie Naylor to Martinez, September 24, 1998; Douglas Brinckley, "National Park Service – Organization of American Historians Report on Sagamore Hill"; letter, Gable to Dichtl, September 7, 1998; memorandum, Chris Dearing to Sagamore Hill exhibit team, August 31, 1998; all SAHI: Interpretation Files, Folder: Historians Conference.

monumental American figure." In part, this was because (as Brands noted) the space given to Roosevelt's presidency in the existing exhibits was "woefully inadequate." The historians, in short, subjected the old interpretive schema to sustained criticism. In place of the old tripartite division – family life, children, and public career – they envisioned an exhibit focused far more heavily on public events and achievements. Of 40 subsections they proposed, no more than six were to be devoted to personal and family issues.[152]

The panelists considered some questions that were not strictly interpretive. Too few people were making the effort to visit Old Orchard; perhaps improving the pedestrian path, providing better signage, making the front doorway more welcoming, and changing the house's name to the Theodore Roosevelt Museum would attract more visitors. Perhaps, too, building an addition or removing the staff quarters from the service wing would make more space available for exhibits. Perhaps the path to the beach could be cleared, water views recaptured. Perhaps, after the new installation was complete, the 2001 centennial could become a "springboard to obtain funding for larger scale projects at the site."[153] Perhaps there could be brighter lighting in the house, more prominence given to the guns in the Gun Room.

For Superintendent Martinez, the panelists' concern with issues beyond the exhibits themselves diminished the value of their work. Before the meeting, and without informing Martinez, John Gable had distributed his own list of "problems and issues" to the other historians. Some of these, Martinez wrote afterwards, were rehashing of old issues that "had no relevance to the task expected of the historians." Gable used his own final report to argue once again the TRA position on a series of old disagreements concerning the Theodore Roosevelt House, including lighting, the gun display, and the alterations to the nursery and the school room. But Martinez thought he detected Gable's influence in the other historians' reports as well.[154] Certainly Gable had made no effort to conceal his intent to direct the agenda. During the meetings, he pledged to make up to $200,000 of endowment funding available for Old Orchard Museum; afterwards, he used the promise as leverage for favored projects. Assuring the Harpers Ferry Center that the association would provide as much as $100,000 "as soon as needed," he commented that "we do wish to see some of this money used for interactive electronic exhibits" and pledged a further $100,000 for "media-meeting facilities."[155]

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[152] Memorandum, Chris Dearing to Sagamore Hill exhibit team, August 31, 1998; SAHI: Interpretation Files, Folder: Historians Conference.

[153] Memorandum, Dearing to exhibit team, August 31, 1998; SAHI: Interpretation Files, Folder: Historians Conference.

[154] Letter, Martinez to Dichtl, November 18, 1998; SAHI: Interpretation Files, Folder: Historians Conference.

[155] Letter, Gable to Cindy Darr (Assistant Chief, Division of Exhibits, HFC), October 26, 1998; SAHI: Interpretation Files, Folder: Historians Conference.

Gable clearly wanted this very much. "Old Orchard badly needs a new multi-use auditorium or media area," he told Dichtl. He envisioned something like the auditorium the TRA enjoyed at the Theodore Roosevelt Birthplace in New York. The service wing, currently used for staff apartments, offered the perfect solution: "Knock out interior walls; reconfigure the space; knock out the ceiling and eliminate the second floor if this seems necessary; replace an exterior wall if more floor space is required; adapt the existing structure to a new use. This has exciting possibilities."[156]

Gable's letter implied that the historians as a group had recognized the "need for new media-meeting facilities," and two years later he told NPS Director Stanton the same thing.[157] Yet the other panelists' reports showed little if any interest in the idea. Notes taken by Superintendent Martinez and other NPS staff and circulated to the participants after the conference did not mention it at all.[158]

After the conference, Martinez complained to Dichtl about another historian. Beyond urging that it focus on Roosevelt's "conservationist legacy," Douglas Brinckley's final report did not address the content of the new exhibits at all. On the other hand, it subjected the management of the park to acidic criticism, even directing a harshly personal attack at the staff members who lived in the service wing.[159] Since the conversion of the service wing was an essential step in Gable's plan for multi-media facilities, it may not have been irrelevant that – as he himself prominently stated – Brinckley was a trustee of the TRA.

No formal evaluation of the historians' workshop was carried out. Circumstantial evidence suggests its success was mixed. Yet whatever its shortcomings, the panel did lend support to a dramatic shift in the museum's presentation of Roosevelt. And when the Harpers Ferry Center and park staff had finished their work (Fig. 37), their exhibit closely resembled that envisioned by the historians.[160]

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[156] Letter, Gable to Dichtl, September 7, 1998; SAHI: Interpretation Files, Folder: Historians Conference.

[157] Letter, Gable to Stanton, June 20, 2000; SAHI: Curatorial Files.

[158] Memorandum, Dearing to exhibit team, August 31, 1998; SAHI: Interpretation Files, Folder: Historians Conference.

[159] Douglas Brinckley, "National Park Service – Organization of American Historians Report on Sagamore Hill"; letter, Gable to Dichtl, September 7, 1998; SAHI: Interpretation Files, Folder: Historians Conference.

[160] Harpers Ferry Center, Division of Exhibits, Old Orchard Museum Exhibits, Sagamore Hill NHS: Planning Session Notes (Chris Dearing, December 24, 1998), pp. 5-8, and Harpers Ferry Center, "Theodore Roosevelt Museum, Sagamore Hill National Historic Site: Schematic Proposal," June 3, 1999, p. 1; SAHI Interpretive Files: Folder, HFC Exhibit Plans.

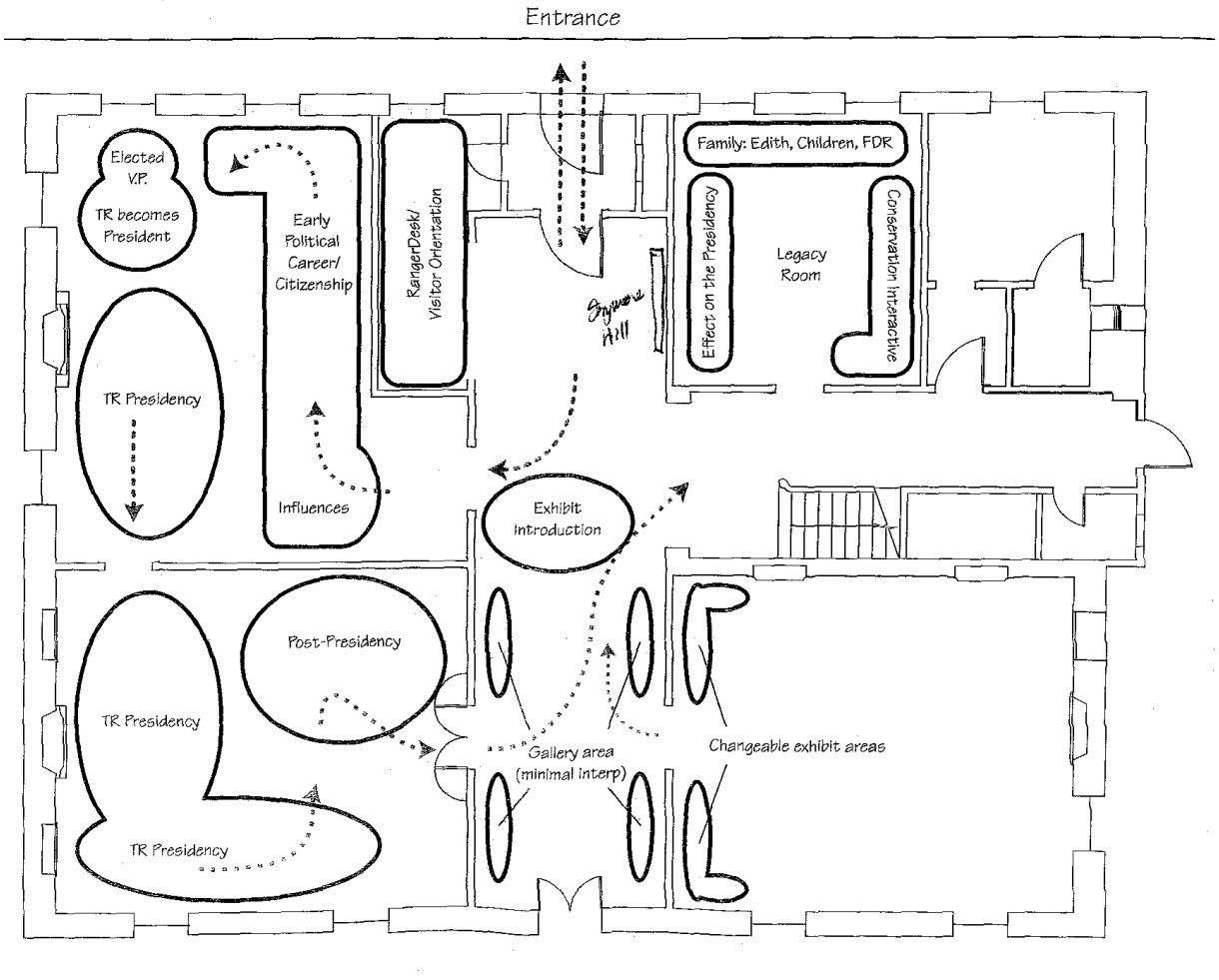

Fig. 37. A bubble diagram of the planned new exhibits at Old Orchard Museum prepared by the Harpers Ferry Center in 1999 shows a chronological arrangement with a strong emphasis on Roosevelt's political career. (Reprinted from *Theodore Roosevelt Museum, Sagamore Hill National Historic Site*, Schematic Proposal, June 3, 1999.)

Though organized thematically, rather than chronologically, its outline preserved the core of the panelists' proposal: Roosevelt before, during, and after his presidency. Gone was Old Orchard's presentation of a model American family, led by a larger-than-life individual. No longer would Sagamore Hill present a family idyll in which politics and statecraft hardly intruded. From now on, as the historians urged, the park's most elaborate interpretative mechanism would present a story grounded squarely in the realities of American politics and public life. Family and personality would continue to be important; the story told would still be the trajectory of a great man's life; but the exhibits would leave visitors in no doubt as to "why Sagamore Hill is important, and not simply interesting" – "why Theodore Roosevelt is considered a monumental American figure." And the answers would point neither to cozy domesticity nor to rough-and-tumble with the children – nor even to a legacy of distinguished and patriotic progeny. They would point unmistakably towards the great public issues of Roosevelt's time.

The new exhibit introduced substantial changes to Old Orchard's architectural appearance. In place of the traditional emphasis on the building as a home, park staff argued strongly for covering up windows and removing domestic elements such as fireplaces and built-in bookcases: they wanted it to look as much as possible like a museum, rather than a rehabilitated house. The Americans for Disabilities Act prompted other changes intended to improve access. Curator Verone's "artifact-rich" list of proposed exhibit items made new heating and air-conditioning systems essential. Recognizing that Roosevelt was the first president to be widely filmed, the team agreed that audiovisual elements should be integrated into the exhibits, and that the conditions under which they could be seen would have to be improved; this meant reducing ambient light, controlling sound spill, and providing space for equipment

All of these changes were proposed on the basis of the park's understanding that Old Orchard was not, in terms of federal preservation law, a resource contributing to the park's historical significance. However, in the course of reviewing the plans for compliance, New York State's Historic Preservation Office reversed this judgment and ruled that the building was not only historically but also architecturally significant: it was eligible for individual listing on the National and State Registers of Historic Places as a distinguished mansion" with "inconspicuous yet tasteful support buildings."[161]

In the end, the house's interiors would undergo only minor and largely reversible architectural changes, yet they would still emerge looking as much like abstract museum spaces as it was possible to make them, and they would be dominated by substantial cases, wall displays, and labels.

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[161] NY State Historic Preservation Office, Resource Evaluation, September 18, 2001, with letter, Greg Donofrio to Lorenza Fong, September 18, 2001; Northeast Regional Office, Boston, History Program Files). The determination of eligibility included the service building complex as well as the mansion itself.

These changes would not happen right away, however. In the spring of 2000, with exhibit planning advanced almost to the stage of fabrication and an "official opening" scheduled for the centennial of Theodore Roosevelt's inauguration on September 14, 2001, the Harpers Ferry Center canceled funding "until further notice": its own budgetary problems were exigent. After 15 years waiting for new exhibits, it looked as if Sagamore Hill would once again find itself on the waiting list. The TRA's John Gable wrote letters, threatened to withhold endowment support, and promised to launch a capital campaign (he did the former, though for a different purpose; he did not do the latter). Alarmed by the upcoming centennial, acting Superintendent Diane Dayson expressed "great concern" over the possibility of "several political inquiries."[162] Funding was not restored. The centennial passed without the long-awaited new exhibits. They opened to the public, finally, in the fall of 2004.

Epilogue: The Road Ahead

The exhibits represent a major step towards a new interpretation of Sagamore Hill. Yet already new interpretive frontiers can be glimpsed. In breaking with the traditional presentation, the new exhibits veered to the other extreme, replacing a focus on personality and family life with an emphasis on public issues that had little connection to the concrete details of life at Sagamore Hill. To reweave the personal and the public may well be a challenge for future generations of interpreters. Much also remains to be done with the more controversial themes of Roosevelt's life, such as race and gender relations, or imperialism.

Gay Vietzke, the park's new superintendent at the time of this writing, believes that telling a better and more interesting story is the most exciting challenge now facing the park.[163] Vietzke came to Sagamore Hill from the Northeast Regional Office, where she had been closely involved in the formation of a "Civic Engagement" initiative launched by Regional Director Marie Rust in 2001. Civic Engagement aimed to "enhance interpretation and understanding of historical context" at parks,[164] but it was particularly concerned, as the name suggests, with improving the ways in which the Park Service talked to and with its various publics. These were important themes for Regional Director Rust. In 1999, she had joined the leaders of eight historic sites around the world in organizing a Coalition of Historic Site Museums of Conscience. What these

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[162] [Diane Dayson], "Sagamore Hill National Historic Site Briefing Report," July 6, 2000, n.p.; Harpers Ferry Center, SAHI Box: Misc.

[163] Vietzke, interview with author, 2004.

[164] "The National Park Service and Civic Dialogue," internal Northeast Region document, revised September 4, 2001 (provided by Martin Blatt, Chief of Cultural Resources/Historian, Boston NHP).

museums had in common was that each dealt with a challenging social issue, whether immigration or political repression.

Regional Director Rust applied her concept of socially engaged interpretation directly to the work of the parks. In 1997, she convened a working group to create a new strategy for interpretation and education. The group's 28 members included superintendents and interpreters from across the Northeast Region, in addition to Chief Historian Pitcaithley of the Washington office and Wilke Nelson of the National Park Foundation. Releasing "The Road Ahead" at a regional superintendents' conference that fall, Director Rust made clear her "expectation" that all park managers "make every effort" to achieve its goals "and support these efforts at every level of our organization."[165]

While nothing in "The Road Ahead"[166] is inconsistent with other NPS interpretive planning guides,[167] its tone is distinctly different. It is less concerned with the formal requirements of a good interpretive plan than with the story's content. There is urgency. It speaks of engaging a "more active citizenry" and of opening "new doors" to life-long learning.[168] Its first goal – "Discover the Untold Stories" – announces a key concern: the historical experiences of people of color, women, working people, minorities of all kinds, who have often been overlooked by interpreters at many if not most parks. The plan is a call to democratize the telling of history. It is also an invitation to take on controversial themes and admit multiple viewpoints on them.

It will be interesting to see where "The Road Ahead" leads for Sagamore Hill. The report directs each park to prepare a Comprehensive Interpretive Plan, and this has not yet been done. It may prove challenging, for some of the "multiple points of view" encouraged by the planning process will surely seem critical of Roosevelt, and that may anger some Theodore Roosevelt enthusiasts and park supporters. The great peacemaker was also an imperialist; the opponent of unbridled corporate power had a racist streak, and could be a determined opponent of working people; the conservationist was an avid hunter; the advocate of female suffrage also called for women to assume a subordinate role in society. How can a contemporary American public understand these seeming contradictions in context? What unique insights can they gain from a visit to Sagamore Hill – insights distinct from those that can be gained from reading a book? While

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[165] Memorandum, Regional Director, Northeast Region, to Superintendents, Northeast Region, December 16, 1997; SAHI: Interpretation Files: Folder CIP.

[166] "The Road Ahead: A Strategy to Achieve Excellence in Interpretation and Education in the National Park Service Northeast Region," October 1997.

[167] See, for example, Harpers Ferry Center, Division of Interpretive Planning, *Planning for Interpretation and Visitor Experience*, 1998; copy in SAHI Interpretative Files, Folder: Interpretive Training.

[168] "The Road Ahead," n.p. (Executive Summary) and p. 6.

historians and social critics will continue to debate these and other historical problems, interpreters at Sagamore Hill must also ground them in the place that Roosevelt shaped, and where he lived and worked (Fig. 38). Their challenge will be to weave together the personal and the public, to illuminate these and other great issues in American history in the special way that only a visit to this remarkable place can do.

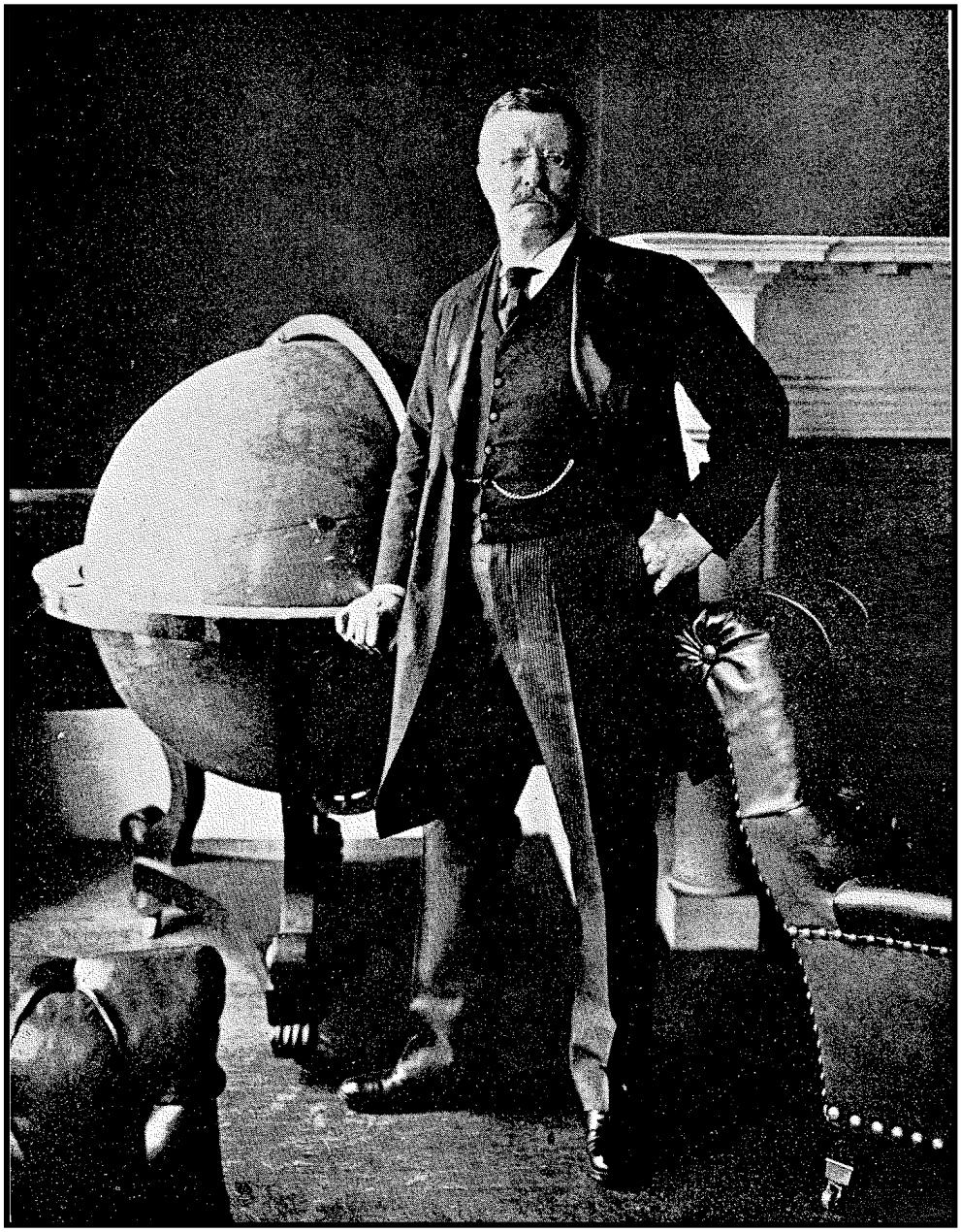

Fig. 38. Balancing the Roosevelt of world affairs with the Roosevelt of Sagamore Hill: a continuing challenge to park interpreters. (Reprinted with permission from Hermann Hagedorn, *A Guide to Sagamore Hill,* p. 32.)

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LIST OF REPOSITORIES

A. Source Repositories

1. National Park Service Repositories

Sagamore Hill National Historic Site:

- Central, curatorial, interpretation, and maintenance files
- CRBIB-NRBIB collection
- Archives, including
  - Papers of the Theodore Roosevelt Association
  - Papers of the Friends of Sagamore Hill

Extensive documentation of all aspects of park management, especially after about 1990.

Washington Office:

- Park History Files and staff library
- Planning Department Files

Northeast Regional Office, Boston:

- History, Compliance, and Planning Program files

Northeast Museum Services Center, Charlestown, MA:

- Curatorial Files, some planning documents

Harpers Ferry Center:

- History Collection
- Papers of Ronald F. Lee
- Annual reports
- Planning documents

Denver Service Center's Technical Information Center:

- Plans and drawings for infrastructure, utilities, and maintenance projects
- Planning documents

2. Other Repositories

National Park Foundation, Washington, D.C.:
Files pertaining to management of the Theodore Roosevelt Association endowment

National Archives and Records Administration (NARA), Archives II, College Park, MD:
Papers relating to park acquisition
Office files of Conrad Wirth

NARA Mid-Atlantic Region Archives Facility, Philadelphia, PA:
Philadelphia regional office papers up to about 1966, including the most important collection of documents regarding early management of park

Federal Records Center, Waltham, MA (Northeast Region):
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APPENDICES

APPENDIX A

MEMORANDUM PREPARED BY THE TRUSTEES OF THE ROOSEVELT MEMORIAL ASSOCIATION IN CONNECTION WITH THE PROPOSAL TO PURCHASE SAGAMORE HILL AND TO ESTABLISH IT AS A NATIONAL SHRINE, JUNE 15, 1949

Reproduced from Gary Roth,
The Roosevelt Memorial Association and the Preservation of Sagamore Hill, 1919-1953)

The purpose of the Trustees of the Roosevelt Memorial Association in contracting to purchase Sagamore Hill is to establish it as a national shrine that shall dramatize the highest traditions of American family life.

At this time, when the American home is being subjected to unprecedented strains, the Trustees seek to call attention anew to a home that for a generation was acclaimed everywhere as a model of what an American home should be, in loyalty, affection, discipline, unsullied integrity and sacrificial devotion to the national welfare. The Trustees believe that Americans, coming to Sagamore Hill will see not a house but rather a home that will raise queries in their minds about their own homes, wake uneasy thoughts of neglected opportunities, even crystallize new resolves. The Trustees believe that by giving Americans an opportunity to catch the contagion of a singularly healthy, happy and patriotic family, they will help in a measure to revitalize those moral and spiritual values on which rest the greatness and even the existence of nations.

No better way has been found to do this than to bring large numbers of people into the atmosphere in which a great American lived and worked, knew great happiness and personal triumph, and suffered defeat and sorrow. A historic house is a dramatization of a personality and a life. No one can measure what Mount Vernon and Monticello have done and are doing in making Washington and Jefferson live again to the people who go there. The shadow of a great life falls across our little lives, and a particle of the flaming spirit lodges like a seed in our hearts. We follow greatness through the rooms where it lived and made history, and we are never again quite as we were. Should the residents of Cove Neck permit the opening of Sagamore Hill to the public, we believe that they will at the same time be opening the hearts of thousands of men and women and young people to the spirit of Theodore Roosevelt.

Visitors who come to Sagamore Hill will feel, as never before, the inspiration of the character and life of Theodore Roosevelt, whom Elihu Root declared to be "the greatest

teacher of the essentials of popular self-government the world has ever known". There, within its walls, he will speak to them - through objects and surroundings associated with him - of honesty and courage, unselfish public service and undivided loyalty. Such an experience cannot help making them better Americans because they will have felt his presence in the place where he was most vitally himself.

The Trustees believe that, as Sagamore Hill becomes a place of pilgrimage, it will be a factor in education for citizenship comparable to Mount Vernon, Monticello and the Lincoln Memorial in Washington. For Sagamore Hill will teach those who fall under its spell precisely those qualities which are most needed in American life today - sound family relationships, love of country, devotion to principles and willingness to fight for them, and that regard for people as human beings which distinguished Theodore Roosevelt and which makes for understanding and national growth.

Thus, when this historic house is opened to the public, a new national educational institution will have been inaugurated.

A further and important aspect relating to the preservation of Sagamore Hill is its historic significance as a "period piece". Representing, as it does, the home of a typical well-to-do American family during the Eighties and Nineties of the nineteenth century and the first two decades of the twentieth, Sagamore Hill is regarded by students of the houses of that period as unique, and worthy of preservation for that reason, even if the weightier reasons given above did not exist.

In preparing the plans for the conversion of a residence into a national shrine, the Trustees have retained the eminent landscape architect Gilmore Clarke and his associates and sought the advice of others experienced in developing similar memorials, among them, Mr. Hardinge Scholle, director of the Museum of the City of New York and Mr. Stephen H.P. Pell, the head of the Fort Ticonderoga memorial. The plans recommended by Mr. Clarke are embodied in the accompanying sketch. They contemplate the use of presumably not more than 20 acres of the 83 in the Theodore Roosevelt estate; a parking field; the widening and repaving of the Sagamore Hill Road from the point where it leaves the Cove Neck Road; and the construction of an administration building, with toilet facilities.

The Association expects to maintain the property in a manner befitting the home of a former President of the United States, in keeping with the standards of dignity, order,

courtesy and efficiency which mark the management of Mount Vernon and Monticello. It will be a primary concern of the Trustees that visitors shall not invade the privacy of the property owners of the village, and every effort will be made to control their movements within specified limits. Roaming into adjacent properties will be prevented by fences or impenetrable hedges, and by the use of guards at critical points. Signs will be placed where the Sagamore Hill Road branches off the village road, indicating that the latter is private and closed to the general public, and if necessary a guard will be stationed at that point in order to preserve the privacy of the village. Recognizing the peculiar relation of the residents to the proposed shrine, the Trustees will invite the mayor of the village to serve, ex officio, on the governing body that will direct the project, in order that the village residents will have a voice in the management of the shrine and in the formulation of policy. The direction of the project will rest in the Board of Trustees of the Roosevelt Memorial Association, acting through the following Committee which has been appointed to supervise its development:

Walter F. Brown
William M. Chadbourne
Frederick M. Davenport
James A. Garfield
David M. Goodrich
Hermann Hagedorn
Chauncey J. Hamlin
Will H. Hays
David Hinshaw
Frank R. McCoy
Stephen H. P. Pell
Howard C. Smith
Roger W. Straus

The Association expects to cover the costs of the maintenance and protection of the estate, and of the house and its contents, by charging an admission fee, estimated as between 50 cents and one dollar. The experience of similar national shrines indicates that such a charge will bring in sufficient revenue to cover the expense of operating Sagamore Hill as a shrine, for about six or seven months in the year, from April first through October thirty-first.

Attached are reproductions of plans, prepared by Mr. Gilmore Clarke.

New York, June 15, 1949.

APPENDIX B

STATEMENT OF PURPOSE OF THE ROOSEVELT MEMORIAL ASSOCIATION IN MANAGING SAGAMORE HILL, 1951

Reproduced from Gary Roth,
The Roosevelt Memorial Association and the Preservation of Sagamore Hill, 1919-1953

Sagamore Hill is more than the historic home of a great President. It is a symbol of Theodore Roosevelt's conception of the Good Life for the individual and the nation, expressed there in the daily living of an American family, and in his own continuous challenge to all that was best in the American character.

The purpose of the Roosevelt Memorial Association in preserving Sagamore Hill is to make it

first, a place of public pilgrimage, and of inspiration to sound family life and responsible citizenship;

second, a beacon, sending across the spiritual confusion of our time the clear beam of Theodore Roosevelt's gospel of faith, character, courage, moral standards and civic righteousness;

third, a landmark of the kind of America that Theodore Roosevelt dreamed of and fought for; an America of personal independence, self-reliance and justice; honesty, courage, common sense and capacity for effort; love of country, love for people, faith in life and faith in God.

fourth, a rallying-point and dynamic center - such as it was in his own lifetime - for those who long to see that kind of America built in the hearts and minds of the American people.

fifth, a shrine in the deepest sense of the word, where Americans of all ages and conditions may, in a time of fear and violence, find inspiration to renew allegiance to those principles of government, those standards of individual and national conduct, which are the foundations of western civilization.

Oyster Bay Enterprise-Pilot, 29 March 1951.

APPENDIX C

CHRONOLOGY OF ACQUISITION

October-November, 1960. Regional office discusses possible acquisition with Theodore Roosevelt Association.

December, 1960. Straus writes formal letter to Conrad Wirth; Wirth replies.

January, 1961. President Kennedy sworn in; Stewart Udall appointed Secretary of the Interior; Conrad Wirth reappointed as National Park Service Director.

January, 1961. Theodore Roosevelt Association executive committee approves further discussions with the National Park Service and retains a public relations firm to help advance their ideas in Washington.

March, 1961. Ronald Lee asks Conrad Wirth to "give Sagamore Hill a push."

May, 1961. Wirth and Secretary of the Interior Stewart Udall visit Sagamore Hill and the Birthplace.

July, 1961. National Park Service staff carries out field work for "Area Investigation Report" to support case for authorizing legislation.

July, 1961. National Park Service and Theodore Roosevelt Association agree on draft legislation; after being approved by Bureau of the Budget and Solicitor's Office of the Department of the Interior it goes to President Kennedy with Secretary of the Interior Stewart Udall's support.

January, 1962. Boone & Crockett Club, Theodore Roosevelt Association tenants at Sagamore Hill, expresses its support for the transfer. Interior assures the Club that a "satisfactory arrangement can be negotiated" to permit it to continue using the Gun Room for its library and other memorabilia.

February, 1962. Five members of the House subcommittee on national parks visit Birthplace and Sagamore Hill, where they are guided by Oscar Straus and Mrs. Ethel Roosevelt Derby. Delegation is led by Subcommittee Chair J. T. Rutherford of Texas and includes Reps. William Harrison (WY), Ralph Rivers (AK), John Saylor (PA), and Roy Taylor (NC).

March 1, 1962. Kennedy mentions Sagamore Hill in major address on environmental conservation to Congress.

March, 1962. Concerned about Senate attitude to Birthplace, Oscar Straus asks Conrad Wirth to talk to Senators Clinton Anderson and Alan Bible.

April 2, 1962. House of Representatives unanimously approves H.R. 8484, sponsored by J.T. Rutherford (D/Texas). The New York *Times* reports that a similar measure is before the Senate subcommittee on public lands and that full approval is expected in this session.

July 25, 1962. Senate passes authorizing legislation.

August, 1962. President Kennedy signs bill authorizing United States to acquire, by donation from the Theodore Roosevelt Birthplace, Sagamore Hill, Theodore Roosevelt Birthplace, and $500,000 or more to be used exclusively for the two houses. When these properties have been transferred, it directs the Secretary of the Interior to declare the two houses National Historic Sites, and to consult the Theodore Roosevelt Association with regard to the establishment of an advisory committee.

APPENDIX D

AUTHORIZING LEGISLATION

...E OF LIBERTY
NATIONAL MONUMENT
RECEIVED
AUG 8 1962
A.M. 7 8 9 10 11 12 1 2 3 4 5 6 P.M.

Public Law 87-547
87th Congress, H. R. 8484
July 25, 1962

An Act

76 STAT. 217.

To authorize establishment of the Theodore Roosevelt Birthplace and Sagamore Hill National Historic Sites, New York, and for other purposes.

Be it enacted by the Senate and House of Representatives of the United States of America in Congress assembled, That, in order to preserve in public ownership historically significant properties associated with the life of Theodore Roosevelt, the Secretary of the Interior may acquire, by donation from the Theodore Roosevelt Association, the sites and structures known as the Theodore Roosevelt House situated at Twenty-eight and Twenty-six East Twentieth Street, New York City, consisting of approximately eleven one-hundredths of an acre, and Sagamore Hill, consisting of not to exceed ninety acres at Cove Neck, Oyster Bay, Long Island, and the improvements thereon, together with the furnishings and other contents of the structures.

Theodore Roosevelt Birthplace and Sagamore Hill National Historic Sites, N. Y. Establishment authorization.

SEC. 2. (a) In accordance with the Act entitled "An Act to create a National Park Trust Fund Board, and for other purposes", approved July 10, 1935 (49 Stat. 477), as amended, the National Park Trust Fund Board may accept from the Theodore Roosevelt Association $500,000 and such additional amounts as the association may tender from time to time from the endowment fund under its control, which funds, when accepted, shall be utilized only for the purposes of the historic sites established pursuant to this Act.

Acceptance of funds.
16 USC 19-19c.

(b) Nothing in this Act shall limit the authority of the Secretary of the Interior under other provisions of law to accept in the name of the United States donations of property.

SEC. 3. When lands, interests in lands, improvements, and other properties comprising the Theodore Roosevelt Birthplace and Sagamore Hill, as authorized for acquisition by section 1 of this Act, and a portion of the endowment fund in the amount of $500,000 have been transferred to the United States, the Secretary of the Interior shall establish the Theodore Roosevelt Birthplace and Sagamore Hill National Historic Sites by publication of notice thereof in the Federal Register.

Transfer of property, etc. to U. S.

Publication in F. R.

SEC. 4. The Secretary of the Interior shall administer, protect, and develop the Theodore Roosevelt Birthplace and Sagamore Hill National Historic Sites in accordance with the provisions of the Act of August 25, 1916 (39 Stat. 535; 16 U.S.C. 1 and the following), as amended and supplemented. Development, etc.

SEC. 5. The Theodore Roosevelt Association, having by its patriotic and active interest preserved for posterity these important historic sites, buildings, and objects, shall, upon establishment of the Theodore Roosevelt Birthplace and Sagamore Hill National Historic Sites be consulted by the Secretary of the Interior in the establishment of an advisory committee or committees for matters relating to the preservation, development, and management of the Theodore Roosevelt Birthplace and Sagamore Hill National Historic Sites. Advisory committees. Establishment.

SEC. 6. The Act entitled "An Act to incorporate the Roosevelt Memorial Association", approved May 31, 1920 (41 Stat. 691), as *amended by the Act approved on May 21, 1953 (67 Stat. 27), which* changed the name of such corporation to the Theodore Roosevelt Association, and by the Act approved on March 29, 1956 (70 Stat. 60), which permitted such corporation to consolidate with Women's Theodore Roosevelt Association, Incorporated, is hereby further amended by adding to section 3 thereof a new subdivision as follows:

76 STAT. 218.

Donation of property.

"(4) The donation of real and personal property, including part or all of its endowment fund, to a public agency or public agencies for the purpose of preserving in public ownership historically significant properties associated with the life of Theodore Roosevelt."

and by deleting the word "and" at the end of subdivision (2) of section 3.

Approved July 25, 1962.

APPENDIX E

ESTABLISHMENT PROCLAMATION

UNITED STATES
DEPARTMENT OF THE INTERIOR
NATIONAL PARK SERVICE
WASHINGTON

ESTABLISHMENT OF THE THEODORE ROOSEVELT BIRTHPLACE AND SAGAMORE HILL NATIONAL HISTORIC SITES

WHEREAS, THE ACT OF JULY 25, 1962 (76 Stat. 217) AUTHORIZED THE SECRETARY OF THE INTERIOR TO ACQUIRE BY DONATION FROM THE THEODORE ROOSEVELT ASSOCIATION, THE SITES AND STRUCTURES KNOWN AS THE THEODORE ROOSEVELT HOUSE AND SAGAMORE HILL, AND IMPROVEMENTS THEREON, TOGETHER WITH THE FURNISHINGS AND OTHER CONTENTS OF THE STRUCTURES, IN ORDER TO PRESERVE IN PUBLIC OWNERSHIP THESE HISTORICALLY SIGNIFICANT PROPERTIES ASSOCIATED WITH THE LIFE OF THEODORE ROOSEVELT; AND

WHEREAS, THE SAID ACT FURTHER AUTHORIZED THE NATIONAL PARK TRUST FUND BOARD TO ACCEPT FROM SUCH ASSOCIATION $500,000 AND SUCH ADDITIONAL AMOUNTS AS THE ASSOCIATION MAY TENDER FROM TIME TO TIME FROM THE ENDOWMENT FUND UNDER ITS CONTROL TO BE USED FOR THE PURPOSES OF THESE HISTORIC PROPERTIES; AND

WHEREAS, THE SAID ACT DIRECTS THE SECRETARY OF THE INTERIOR TO ESTABLISH THE THEODORE ROOSEVELT BIRTHPLACE AND SAGAMORE HILL NATIONAL HISTORIC SITES BY PUBLICATION OF NOTICE THEREOF IN THE FEDERAL REGISTER WHEN THE AFORESAID CONVEYANCES AND TRANSFERS HAVE BEEN MADE; AND

WHEREAS, THE LANDS, INTERESTS IN LAND, IMPROVEMENTS, AND OTHER PROPERTIES COMPRISING THE THEODORE ROOSEVELT BIRTHPLACE AND SAGAMORE HILL SITES, TOGETHER WITH THE FURNISHINGS AND OTHER CONTENTS OF THE STRUCTURES, AND A PORTION OF THE ENDOWMENT FUND IN THE AMOUNT OF $500,000 HAVE BEEN ACQUIRED BY THE UNITED STATES AS AUTHORIZED BY THE SAID ACT:

NOW, THEREFORE, I HEREBY ESTABLISH THE THEODORE ROOSEVELT BIRTHPLACE AND THE SAGAMORE HILL NATIONAL HISTORIC SITES, SUCH SITES TO COMPRISE, RESPECTIVELY, ALL THOSE LANDS, INTERESTS IN LANDS, AND IMPROVEMENTS THEREON, DESCRIBED IN AND CONVEYED TO THE UNITED STATES BY THE THEODORE ROOSEVELT ASSOCIATION, BY DEED DATED JULY 8, 1963, WHICH WAS RECORDED ON JULY 11, 1963, IN THE OFFICE OF THE CLERK OF THE COUNTY OF NEW YORK, NEW YORK, IN LIBER 5939 ON PAGE 281, AND BY DEED DATED JULY 8, 1963, WHICH WAS RECORDED ON JULY 10, 1963, IN THE OFFICE OF THE CLERK OF THE COUNTY OF NASSAU, NEW YORK, IN LIBER 7179 ON PAGE 353, TOGETHER WITH THE FURNISHINGS AND OTHER CONTENTS OF THE STRUCTURES LOCATED THEREON,

SECRETARY OF THE INTERIOR

APPENDIX F

REFERENCES TO THE ENDOWMENT IN EARLY DOCUMENTS

The following brings together significant references to the Sagamore Hill/Theodore Roosevelt Birthplace endowment, dating from 1960 to 1990. An effort has been made to include all known references up to 1970, a selection of important or typical references thereafter.

Theodore Roosevelt Association Executive Committee Minutes, November 30, 1960

> Mr. Straus told of informal talks with Mr. Conrad Wirth, head of the National Park Service, regarding their taking all of the Association properties with the exception of a small endowment held back by the Association in order to make certain that the TRA could be kept together in some working form....
>
> [Regarding authorization for Straus to proceed with the negotiation,] Mr. Root said naturally no one would go forward with plans without authorization on such questions as (1) whether there would be local committees, (2) whether all the endowment would go, (3) whether part of he endowment....
>
> "Mrs. Derby commented on the importance of the TRA activities regarding the giving of information on TR and that was a strong reason for trying to keep a TR Association. Mr. Root said that holding out a part of the endowment for such purposes would mean a fairly large amount. He said $100,000 would be useless for such a purpose.

Oscar Straus: Letter to Conrad Wirth, December 6, 1960

> We would like to discuss with you the turning over of these two properties to the Federal Government to be administered by the National Park Service. It is our present thought that this gift would be accompanied by a substantial portion of the Association's endowment fund, which now approximates $950,000. (National Park Service Library, File Correspondence 1941-62)

Conrad Wirth: Letter to Oscar Straus, December 22, 1960

I shall be very glad to sit down and discuss with you and Horace Albright the question of Sagamore Hill being transferred to the Federal Government....Naturally, the Association's willingness to set up a substantial endowment fund in connection with the donation is most generous. I believe the best way to approach the matter would be for us to draft a proposed bill.... (National Park Service Library, File Correspondence 1941-62)

Theodore Roosevelt Association Executive Committee Minutes, January 9, 1961

The meeting was called to order by Mr. Straus, who stated that its purpose was for further discussion, and to arrive at a decision, concerning the question of asking the National Park Service whether they would be willing to work with the Association to introduce a Bill to transfer Sagamore Hill and Roosevelt House, together with a proportion of the Association's funds, to the Federal Government as part of the National Park System.....(par) Horace Albright explained the relationships that the National Park Service sometimes develops with local groups,..."and if the Park Service continues for the next thirty to forty years the way it has, the TR Association would find that the Park Service will be anxious to use its services. However, there is no way that control could be divided, it must pass directly to the Park Service. There is a trust fund, into which money can be put and earmarked so that it does not go into the Federal Treasury, but can be earmarked for special objectives, and there are many instances where this has been done....(Par) "Mrs. Bullock inquired if funds could not be specifically allocated for the educational program, and Mr. Straus replied that in giving funds to the government on this basis they can be earmarked for certain things. Mr. Albright confirmed this by saying they could be earmarked for whatever one wanted. (Par) "Mr. Hall inquired if funds could be earmarked for purposes within the fund, and Mr. Straus pointed out that some of the funds could be withheld.(Par) "Mr. Street stated that he thought it would be perfectly feasible to deliver half of the funds for this specific purpose and retain the other half under the control of the Association for what might come up after that.

Ronald Lee: Memo to Conrad Wirth, February 6, 1961

The proposed inclusion of an $800,000 endowment with the gift of the two properties has some bearing on and supports the propriety of accepting responsibility for the Birthplace House as well as Sagamore Hill. The income from the endowment would be sufficient to maintain the Birthplace without other revenue. (NARA - Philadelphia, Box 6, National Park Service Northeast Office Administrative Correspondence 1953-68, Folder: Sagamore Hill 10/53-8/61)

Daniel Beard: Memo to Conrad Wirth, February 27, 1961

The Roosevelt Association is offering Sagamore Hill, the Birthplace and an endowment of about $850,000....The operating budget in times past for the house [the Birthplace] is approximately $50,000. The income from $850,000 would hardly pay for the maintenance and operating of the Birthplace....The Regional Office has recommended acceptance of both the Birthplace and Sagamore Hill, but suggested authority to dispose of the Birthplace....In your discussion with the Trustees of the Roosevelt Association, we recommend you try to persuade them to retain the Birthplace and if necessary, the endowment, but that they turn over Sagamore Hill to the National Park Service." National Park Service Library, File Correspondence 1941-62)

Conrad Wirth: Letter to Oscar Straus, March 3, 1961

We have left out the birthplace [from the bill being drafted] as our reports indicate that the changes which have been made are so great that it would have little public interest. (National Park Service Library, File Correspondence 1941-62)

Roy Appleman: Memo to Conrad Wirth, March 17, 1961

The principal issue is whether the Service should accept the Birthplace House....The endowment of about $850,000 at 4% interest would bring in approximately $34,000. That is not enough to cover the anticipated expenses of operating the Birthplace House, based on the figures given in Pitkin's report, attached. The Service would be better off from every angle to take Sagamore Hill without a penny of endowment than to accept the Birthplace House and Sagamore Hill with the endowment. (NARA - Philadelphia, Box 6, National Park Service Northeast Office Administrative Correspondence 1953-68, Folder: Sagamore Hill 10/53-8/61)

National Park Service: Draft Authorizing Legislation, April 1961

To further the purposes of this Act the Secretary is authorized to accept from the Theodore Roosevelt Association an endowment fund in the amount of $_____, and his acceptance may be made on terms and conditions mutually satisfactory to him and the Association including a condition that the Executive Committee of the Association may continue to invest and reinvest the fund. However, the investment activities of the Committee shall at all times be subject to the approval of the Secretary. The Secretary is further authorized to accept gifts or bequests of personal property for the benefit of Theodore Roosevelt Birthplace National Historic Sit and Sagamore Hill National Historic Site and to make the gifts or bequests available for investment or reinvestment as a part of said fund. The fund and income there from may be used only for

purposes of the historic sites. In order that the sites may be operated, to the extent possible, without the appropriation of funds from the general fund of the Treasury, the Secretary may also make available for investment and reinvestment as a part of the fund the revenues derived from administration of the sites in such amounts as are necessary to provide adequate income from the fund to meet the operating costs of the historic sites. The income for operating the historic sites shall be covered into the Treasury of the United States in a special account and be subject to disbursement for that purpose by the Treasury Department. (Attached to letter, Wirth to Straus, April [illeg.], 1961: NARA - Philadelphia, Box 6, Administrative Correspondence 1953-68, SH 10-53-8/61)

Oscar Straus: Letter to Conrad Wirth, May 1, 1961

We are having an informal meeting today with our lawyer trustee members, on the Bill, to see what can be done, particularly with regard to the problems of the Trust Fund. I will communicate with you just as soon as I get back, which will be no later than the 21st of May. (NARA II - College Park, Office Files of Conrad Wirth, Box 22 Region V-VI, Folder: Region V 1961)

Oscar Straus: Letter to Conrad Wirth, May 26, 1961

[The bill relates to the donation of the two properties,] together with an Endowment Fund in the amount of $500,000. The purpose of this letter is to set out the proposed plans with respect to the future of the balance of the Association's Endowment Fund which it is retaining in the amount of approximately $500,000." [Straus next explains that the Association's Endowment Fund balance "of about $1,000,000" is what remains from the funds contributed over the years, less expenditures on the two properties and other projects, and that the Association must retain funds with which to pay pensions to former employees and meet] "certain other small liabilities. In addition, while the undersigned cannot bind the Executive Committee or the Association in this regard and any commitments must necessarily await the next meeting of the Executive Committee, that Committee has been considering the continued performance of certain of the Association's functions after the transfer of Theodore Roosevelt House and Sagamore Hill to the Secretary of the Interior...." [for example] "Assistance to the National Park Service" in "making Sagamore Hill [and the Birthplace] inviting and educational," "making information and materials regarding Theodore Roosevelt available to the public," and "in such other ways as might help achieve the purposes and preserve and operate the sites," as well as continuance of the public school essay contest, the annual Theodore Roosevelt Medal, and other Roosevelt-related activities. "The Association understands, of course, that especially in view of the small income it will have after the transfer of the sites and half its remaining Fund, it can do no more than assist the National Park Service which will be responsible for the sites

and their operation....The Association would, I am sure, use its income (and capital, if necessary or desirable) only for one or more of the foregoing purposes, and if and when the Association decides that it no longer needs part or all of the balance of its Endowment for such purposes as the foregoing, it would turn over to the Secretary of the Interior as an additional Endowment that portion of its remaining Endowment Fund which it then no longer needs....It is understood that the Association and the National Park Service will exchange annually financial reports with respect to the use and status of the portions of the Endowment Fund under their respective controls. (SAHI Curatorial Files)

Conrad Wirth: Letter to Oscar Straus, June 1, 1961

I have just received your letter of May 24 setting out proposed plans with respect to the Association's Endowment Fund. The letter contemplates the donation of the Birthplace and Sagamore Hill, whereas the draft of bill does not include the birthplace. I know we discussed this and that I indicated we would include it; however, after seeing it and talking to several people, including members of the Roosevelt family, I cannot see where we would be justified in accepting it and assuming the additional financial burden. (National Park Service Library, File Correspondence 1941-62)

National Park Service: Draft Authorizing Legislation, May-June, 1961

...[T]here may be accepted from the Theodore Roosevelt Association $500,000 and such additional amounts as the Association may tender from the endowment fund under its control, which shall be known as the Sagamore Hill Trust Fund and shall be utilized for the purposes of the historic site established pursuant to this Act. (Attached to letter, Wirth to Straus, June 1, 1961: NARA - Philadelphia, Administrative Correspondence 1953-68, SH 10/53-8/61, Box 6)

National Park Service: Draft Authorizing Legislation, June, 1961

...[T]here may be accepted from the Theodore Roosevelt Association $750,000 [crossed out; "$500,000" penciled above] and such additional amounts as the Association may tender from the endowment fund under its control, which shall be known as the Theodore Roosevelt Birthplace and Sagamore Hill Trust Fund and shall be utilized for the purposes of the historic sites established pursuant to this Act. (Attached to letter, Wirth to Straus, June 14, 1961: NARA - Philadelphia, Administrative Correspondence 1953-68, SH 10/53-8/61, Box 6)

Conrad Wirth: Letter to Oscar Straus, June 14, 1961

Since writing you on June 1, I have discussed the matter of the Theodore Roosevelt Birthplace and Sagamore Hill with the Secretary and Mr. Albright, and am enclosing herewith a revised bill....There is just one item which I should like to mention which may be different from our discussions, and that is the amount of money which the Association will turn over to us from the endowment fund under its control, to be utilized for the site. After studying this more carefully, we believe that we should have $750,000 in the beginning, rather than the $500,000 previously considered. I am putting that amount in the draft of bill enclosed." (TRA Executive Committee Minutes, June 15, 1961)

Theodore Roosevelt Association Executive Committee Minutes, June 15, 1961

The bill which came with Mr. Wirth's second letter stated that they would accept $750,000 from the Association. The previous bill had specified $500,000, but the previous bill did not include TR House. Mr. Straus said that we could not buy Old Orchard if we gave them $750,000. It was asked if it would be easier to get the bill through with more funds, and would they carry out our obligations in pensions. Mr. Albright stated that they can pay no pensions....

...Mr. Straus told the Committee that the current value of our securities is $1,044,176 – a gain of $211,196.

Oscar Straus: Memorandum for the Trustees of the Theodore Roosevelt Association, July 26, 1961

[The proposed bill received from Conrad Wirth] would authorize the National Park Service to accept, as a gift to the national government, Sagamore Hill and Roosevelt House, together with $500,000 of the Association's endowment towards their support. At the present time the Association's endowment amounts to approximately $1,200,000....

...[T]he proposed bill, and the retention of some $700,000 should enable the TRA and its Executive Committee to give advice and assistance to the National Park Service in administering Sagamore Hill and Roosevelt House, and to continue and strengthen its educational programs, both at Oyster Bay and New York City." (SAHI Archives, TRA Papers, Folder H15: Legislative Histories)

Oscar Straus: Memorandum to Theodore Roosevelt Association Trustees, June 26, 1961

> We have now received from Mr. Wirth a draft of a proposed bill, to be presented to Congress, along the lines of one which the Executive Committee has already approved. It would authorize the National Park Service to accept, as a gift to the national government, Sagamore Hill and Roosevelt House, together with $500,000 of the Association's endowment towards their support. At the present time the Association's endowment amounts to approximately $1,200,000....
>
> ...the proposed bill, and the retention of some $700,000 should enable the TRA and its Executive Committee to give advice and assistance to the national Park Service in administering Sagamore Hill and Roosevelt House, and to continue and strengthen its educational programs, both at Oyster Bay and New York City. (SAHI Archives, TRA Papers, Folder H15, "Legislative Histories")

Conrad Wirth: Memo to Legislative Counsel, Office of the Solicitor, July 27, 1961

> The properties involved and an endowment fund are now available for donation to the United States for administration as units of the National Park Service. (National Park Service Library, File Correspondence 1941-62)

Stewart Udall: Letter to President Kennedy, July 31, 1961

> This proposed legislation will enable the Secretary of the Interior to acquire, by donation, the properties,..." [and to establish them as National Historic Sites] "after the lands, improvements, and other properties, described in the bill, and $500,000 from the endowment fund are transferred to the United States. It is very probable that additional funds will be added to this endowment by the Association in the future. (An identical letter was sent to the Speaker of the House." (John F. Kennedy Presidential Library, National Archives and Records Administration, Boston, Select Department of Interior Records, Microfilm Project NK17 (photocopies in SAHI curatorial Files); identical text also contained in letter conveying recommendations of the Department of the Interior in favor of H.R. 8484, August 1, 1961, included in Report to accompany H.R. 8484, 87th Congress, 2d. Session, Senate Report No. 1729, Calendar No. 1688, pp. 3)

U.S. Congress: Report on Authorizing Legislation, August 1, 1961

The purpose of H.R. 8484 is to provide for the acceptance by the United States of the offer of the Theodore Roosevelt Association to donate" [the two properties, their contents, and] "a fund of $500,000 or more which will be available to assist in the maintenance and development of these properties," to give the properties the status of national historic sites, and to provide for their administration by the National Park Service.

The $500,000 to be contributed by the Theodore Roosevelt Association, plus such additional sums as are received from the same source or from others, will either more than cover the development costs or, if treated as an endowment fund, will pay for a part of the maintenance costs. The remainder of these costs, or a large part of them, can be covered by a continuance of the present system of charging a fee for admission to Sagamore Hill or by appropriations of modest amounts from the Federal Treasury. In any event, there will be comparatively slight annual cost to the Government. (Report to accompany H.R. 8484, 87th Congress, 2d. Session, Senate Report No. 1729, Calendar No. 1688, pp. 1-3)

Senator Jacob Javits: Speech Introducing Joint Resolution, August 1961

Both properties were offered on August 1 to the United States by the Theodore Roosevelt Association, along with a $500,000 grant for their upkeep. The administration has approved U.S. acceptance of the properties as national monuments. President Kennedy has praised the donation of the association.... (Congressional Record – Senate, August 9, 1961, pp. 14160-14161)

Horace Albright: Letter to Mrs. Alexander Hamilton, December 30, 1961

I think you know that the National Park Service wants to take over Theo. Roosevelt's Birthplace and Sagamore hill [sic] as historic sites – NATIONAL historic sites; and that the T.R. Association is willing that this be done, and furthermore that the T.R. Association will convey to the Park Service a substantial part of its endowment. There is legislation pending to make the transfer of both properties and the funds. (Harpers Ferry Center, SAHI Box: Misc., "Laws Folder," letter folded inside copy of HR 8484)

William M. Blair, in the New York *Times*, February 9, 1962

The Theodore Roosevelt Association has offered to give the Federal Government the birthplace of the former President, his Sagamore Hill house and $500,000 from an endowment fund for their upkeep. ("President to Seek 3 Shrines in State")

Theodore Roosevelt Association: Press Release, February 16, 1962

The two homes have been offered by the Association to the Federal Government as National Shrines, together with half a million dollars for their upkeep. Secretary of the Interior Stewart L. Udall has announced his acceptance of the properties to be administered by the National Park Service, subject to Congressional approval of the pending bill. The Association will also act as program consultant on educational and other interpretive activities intended to keep alive the ideals and works of the former President. (NARA-Philadelphia, p. 17 #10)

New York Times, February 17, 1962

[The Birthplace was offered to the federal government by the Theodore Roosevelt Association last summer,] along with "Sagamore Hill" and $500,000 for their upkeep. Congress is likely to "act to accept the gift." ("Congressmen Visit T. Roosevelt Home")

Congressman J.T. Rutherford: Speech to Congress, April 2, 1961

We were impressed, secondly, with the magnificent job that the Theodore Roosevelt Association has done over the years not only in maintaining and preserving Sagamore Hill and its invaluable contents...but also in rebuilding his birthplace and filling it and the adjoining home of his Uncle Robert with mementos of his life. And we were impressed, in the third place, with the rare opportunity which the offer of the Theodore Roosevelt Association to donate these properties and a fund of $500,000 or more to the American Government presents....Even if all this cost [i.e. $325,000 for capital investment at Sagamore Hill plus $95,000 annually in upkeep for the two houses] had to be borne by the Treasury, it would be a small price to pay in tribute to a great American. But, as I have already said, the Theodore Roosevelt Association has offered to donate a fund of more than $500,000 to the Government along with the buildings, furnishings and land. This fund and the income which will be derived from visitors' fees, if they are charged, will go a long way toward meeting these costs. (Proceedings of the House of Representatives, 87th Congress, 2nd Session. *Congressional Record*, Volume 108, Part 4, p. 5525 (April 2, 1962).

C.P. Trussell, in the New York *Times*, April 3, 1962

A fund of $500,000 or more will be available to assist, and possibly cover, the cost of the development and maintenance of the properties. If appropriations were required, it was asserted, they would be small. ("2 Theodore Roosevelt Shrines In New York Backed by House)

Senator Jacob Javits: Speech in Senate, July 18, 1962

Both properties were offered to the United States on August 1, 1961, by the Theodore Roosevelt Association, along with a $500,000 grant for their upkeep. The administration approved U.S. acceptance of the properties as national monuments. President Kennedy praised the donation of the association...I note that the committee report states that fees and the endowment will make both properties virtually self-supporting and that "there will be comparatively slight annual cost to the Government." (*Congressional Record*, Senate Debate, July 18, 1962, p. 13939.)

Acting Secretary of the Interior John A. Carver, Jr.: Letter to David E. Bell (Director, Bureau of the Budget), July 23, 1962

The bill enables the Secretary of the Interior to acquire, by donation from the Theodore Roosevelt Association, the properties.... They will become national historic sites "after the lands, improvements, and other properties, described in the bill, and $500,000 from the endowment fund of the Theodore Roosevelt Association are transferred to the United States. It is very probably that additional funds will be added to this endowment by the Association in the future.

The income from fees and the endowment fund will go a long way toward offsetting the cost of the administration.

U.S. Congress: Authorizing Legislation, July 25, 1962

...The National Park Trust Fund Board may accept from the Theodore Roosevelt Association $500,000 and such additional amounts as the association may tender from time to tome from the endowment fund under its control, which funds, when accepted, shall be utilized only for the purposes of the historic sites established pursuant to this Act.....

When [the two historic sites, improvements, and contents], and a portion of the endowment fund in the amount of $500,000 have been transferred to the United States, the Secretary of the Interior shall establish [the National Historic Sites]....

The Theodore Roosevelt Association...shall, upon established of the Theodore Roosevelt Birthplace and Sagamore Hill National Historic Sites be consulted by the Secretary of the Interior in the establishment of an advisory committee or committees for matters relating to the preservation, development, and management of the [sites]....

The [Act incorporating the Roosevelt Memorial Association of 1920, as amended in 1953 and 1956] is further amended by adding to section 3 thereof a new subdivision as follows:

4) The donation of real and personal property, including part or all of its endowment fund, to a public agency or public agencies for the purpose of preserving in public ownership historically significant properties associated with the life of Theodore Roosevelt. (Public Law 87-547, July 25, 1962, Secs. 2 (a), 3, 5, and 6.)

Phillip S. Hughes (Assistant Director for Legislative Reference, Bureau of the Budget): Memo for the President, July 25, 1962

The bill would provide for the acceptance by the United States of the offer of the Theodore Roosevelt Association to donate [the two properties, their furnishings, and] a fund of at least $500,000 which will be available to assist in the maintenance and restoration of these properties. After donation, these properties would become national historic sites and would be administered by the National Park Service.

National Park Service: Press Release, July 27, 1962

Secretary of the Interior Stewart L. Udall today hailed the signing of the bill....The bill signed by the President authorizes the Federal Government to accept $500,000 from the endowment fund to be used to maintain the properties, "and the improvements thereon, together with the furnishings and other contents of the structures."

It also provides that the Executive Committee of the Theodore Roosevelt Association shall serve in an advisory capacity to the Secretary of the Interior in matters pertaining to the preservation of the properties.

New York *Times*, July 27, 1962

[In signing the bill, the government has] accepted the offer of the Theodore Roosevelt Association to donate [the two houses] and at least $500,000 to maintain and develop the properties. The buildings and sites will be maintained by the National Park Service. ("Theodore Roosevelt Homes Are Made Shrines by U.S.")

Conrad Wirth: Letter to Oscar Straus, July 31, 1962

Your suggestion for an early meeting to arrange for the actual transfer of the funds and property relating to the Theodore Roosevelt Birthplace and Sagamore Hill National Historic Sites, once the authorization bill is signed by the President, is appreciated. (NARA – Philadelphia, Correspondence Files regarding Establishment of Park Service Sites at Sagamore Hill and Theodore Roosevelt's Birthplace: digital copy, NRBPA-79-413-ROOSEVELT(A), No. 6)

Donald E. Lee (National Park Service Chief of Lands): Letter to Oscar Straus, September 4, 1962

Regional Director Ronald F. Lee and I thoroughly enjoyed our meeting with you and your associates on August 28 to discuss the several matters that will be involved in the donation to the United States of Sagamore Hill lands, personal property, and the endowment associated therewith. (NARA – Philadelphia, Correspondence Files regarding Establishment of Park Service Sites at Sagamore Hill and Theodore Roosevelt's Birthplace: digital copy, NRBPA-79-413-ROOSEVELT(A), No. 10)

Oscar Straus: Letter to President Kennedy, September 7, 1962

On August 26, 1962, you signed Bill No. HR-8484, providing for the acceptance from the Theodore Roosevelt Association of Roosevelt House...; Sagamore Hill...; and the sum of $500,000 to assist in this [sic] upkeep. Recently, I met with the officials of the national Park Service to arrange for the turnover of these properties on July 1, 1963. (SAHI Central Files, Folder H15)

Theodore Roosevelt Association: *Theodore Roosevelt and Responsible Citizenship: A Teacher's Manual of Suggested Class Activities*, 1962

The Federal Government accepted the Association's gift of the two properties and half a million dollars for their maintenance. Both historic sites will be administered by the National Park Service. The Theodore Roosevelt Association will be consulted by the Secretary of the Interior in the establishment of advisory committees concerning the preservation, development and management of the two sites. The Association itself will continue its educational activities related to responsible citizenship. (New York, Theodore Roosevelt Association, revised edition, 1962, p. 7)

Theodore Roosevelt Association Executive Committee Minutes, May 7, 1963

Resolution: "WHEREAS said Act contemplates the transfer by the Association to the Secretary of the Interior of the sites known as the THEODORE ROOSEVELT BIRTHPLACE and SAGAMORE HILL and the structures and improvement thereon together with certain furnishings and other contents, and further contemplates the transfer by this Association to the National Park Trust Fund Board of $500,000 to be utilized for the purposes of the aforementioned historic sites;...

(4) The Association shall, at or about the same time as the aforementioned transfers of Sagamore Hill and the Theodore Roosevelt Birthplace, deliver to the National Park Trust Fund Board $500,000 for utilization for the purposes of THEODORE ROOSEVELT BIRTHPLACE National Historic Site and SAGAMORE HILL National Historic Site....

Donald E. Lee (National Park Service Chief of Lands) to Mark W. Frawley, Jr. (Cleary, Gottlieb, Steen, and Hamilton), May 29, 1963

I am wondering whether you have any word as to how the endowment transfer will be accomplished. (NARA – Philadelphia, Correspondence Files regarding Establishment of Park Service Sites at Sagamore Hill and Theodore Roosevelt's Birthplace: digital copy, NRBPA-79-413-ROOSEVELT(A), p. 71)

Conrad Wirth: Memo to Stewart Udall, July 5, 1963

Moreover, the act authorized the National Park Trust Fund Board to accept from that Association $500,000 and such additional amounts as the Association may tender from time to time from the endowment fund under its control, which funds are to be utilized only for the purposes of the historic sites....

We understand that you plan to attend public ceremonies...on July 8, 1963, at which time you will accept from the Theodore Roosevelt Association the deeds and bills of sale...and – in behalf of the National Park Trust Fund Board – delivery of the $500,000 payment. These acceptances will satisfy the conditions for establishment contained in the aforesaid act. (NARA II - College Park, Sec. Int. Class. Files 59-63, Box 335)

Draft Program of Ceremony, Sagamore Hill, July 8, 1963

Mr. Straus will then present the deed to the property, and probably the bill of sale covering its contents, to the Secretary. e will also present a check for $500,000 which is the transfer of the Endowment Fund from the Theodore Roosevelt Association to the United States. (NARA II - College Park, Office Files of Conrad Wirth, Box 22 Region V-VI, Folder: Region V 1963)

Department of the Interior: Press Release, July 9, 1963

Secretary of the Interior Stewart L. Udall today accepted the deed to the Sagamore Hill National Historic Site...and a check for $500,000, representing the transfer of the Endowment Fund from the Theodore Roosevelt Association to the United States.

The bill...authorizes the Federal Government to accept $500,000 from the endowment fund to be used to maintain the properties, and the improvements thereon, together with the furnishings and other contents of the structures.

Secretary of the Interior: Proclamation Establishing Sagamore Hill and Theodore Roosevelt Birthplace National Historic Sites, July 15, 1963

[Whereas the Act authorized the Secretary of the Interior to "acquire by donation" the two properties and their contents, and authorized the National Park Trust Fund Board to] "accept from such Association $500,000 and such additional amounts as the Association may tender from time to time from the endowment fund under its control to be used for the purposes of these historic properties," [and whereas the lands, furnishings,] "and a portion of the endowment fund in the amount of $500,000 have been acquired by the United States as authorized by the said Act," [the Birthplace and Sagamore Hill National Historic Sites are accordingly authorized].

Conrad Wirth: Letter to Oscar Straus, July 17, 1963

This will acknowledge in writing receipt of the Association's check in the amount of $500,000. The remittance has been deposited.... Upon formal acceptance of the contribution by the members of the National Park Trust Fund Board it will be transferred to the appropriate Trust fund account.

On behalf of the Board, the National Park Service and the Department of the Interior, I wish to express my sincere gratitude to the Association for this generous gift. It will be used for the purposes covered by the Act..... (NPF Files)

Conrad Wirth: Letter to Stewart Udall, July 26, 1963

Enclosed is a copy of my letter of July 17 to Mr. Oscar Straus acknowledging receipt of a check in the amount of $500,000 from the Theodore Roosevelt Association, payable to the National Park Trust Fund. The remittance was tendered pursuant to the provisions of the Act....

In accordance with the authority vested in the National Park Trust Fund Board....to accept gifts or bequests of personal property for the benefit of the National Park Service, it is recommended that you sign the carbon copy of this

letter....and return it to the undersigned to indicate your acceptance of the $500,000 contribution.

I wish to take this opportunity, as a member of the board, to voice my acceptance of this generous contribution. An identical letter is being written to Secretary of the Treasury Dillon in order to obtain the required approval from three members of the Board." (The text was repeated, with the substitution of the name, in a letter to Treasury Douglas Dillon, nd, but before August 1, 1963: NPF Files.)

National Park Service Assistant Director Hillory Tolson: Memorandum to Conrad Wirth, September 27, 1963

Subject: $500,000 donation to National Park Trust Fund from Theodore Roosevelt Association

The subject donation, as you know, has been tendered by the Association and accepted by the Trust Fund Board under authority of the act..., which provides that the funds in question shall be utilized only for the Theodore Roosevelt Birthplace and Sagamore Hill National Historic Sites.

Since appropriated funds are being made available (even though on a somewhat limited basis) for the operation and certain developments at these Sites, it is our understanding that there is no immediate need or plan to utilize any part of the donation in the near future.

Accordingly, subject to your concurrence, it is our plan to request the Treasury Department to invest the $500,000 donation in whatever manner would be in the best interest of the Trust Fund. (NPF Files)

Lyman Tondel (Theodore Roosevelt Association Trustee): Letter to Ronald Lee, October 9, 1963

[In September, 1963, the Executive Committee met to discuss paying the property tax bill for the last half of 1963 to Cove Neck. They considered a letter from Cove Neck Village] which said that...in view of its rather small tax income it was a cause of embarrassment and anxiety that as much as $1.319.24 that was said to be the tax due on Old Orchard would not be received. After considerable discussion the Executive Committee voted to contribute, in lieu of taxes on this one occasion only, the entire amount of $1,319.24.... [W]hen Sagamore Hill was taken over by the Association and became tax exempt, the Association similarly contributed $1,000 to Cove Neck....In any event, I am sorry to say that in view of the action already taken by the Association as indicated above, Mr. Straus and I

feel quite clearly that the Executive Committee would be unwilling to pay further taxes or make a further contribution in lieu of taxes. (NARA - Philadelphia, Entry 413, National Park Service Northeast Regional Office General Correspondence 1966-68, Box 28).

National Park Service Acting Director Hillory Tolson: Letter to Chief, Investment Branch, Division of Deposits and investments, Treasury Department, November 12, 1963

There is now on deposit in the National Park Trust Fund Account, 14x8064.1, $500,000 donated by the Theodore Roosevelt Association for the Theodore Roosevelt Birthplace and Sagamore Hill National Historic Sites, New York.

Since appropriated funds are being made available on a limited basis for operation and certain developments at these Sites, there is no immediate need or plan to utilize any part of this donation in the near future.

Accordingly, it is requested that your office arrange to invest the $500,000 in whatever manner would be in the best interest of the Trust Fund. (NPF Files)

Ronald Lee: Memorandum to Conrad Wirth, November 13, 1963

Mr. Tondel, in his letter to us of October 9, stated that both he and Mr. Oscar Straus felt that the Executive Committee of the Association would be unwilling to pay further taxes or make further contributions in lieu of taxes....

As you are aware, the Association has donated $500,000 toward the upkeep of the properties, and in view of the stated position by Mr. Tondel and the Association's considerable contributions to the Federal Government, we believe no further requests for financial assistance should be addressed to the Association but other means should be explored to pay the taxes. (NARA – Philadelphia, Correspondence Files regarding Establishment of Park Service Sites at Sagamore Hill and Theodore Roosevelt's Birthplace: digital copy, NRBPA-79-413-ROOSEVELT(A), p. 133)

Theodore Roosevelt Association President William B. Nichols: Letter to Ronald Lee, November 26, 1963

...I am writing this letter to set forth our Association's understanding of certain cardinal points in the relationship between the National Park Service and our Association...." [– 1) TRA to continue to use office space at Birthplace for headquarters; 2) and to use one room at Old Orchard; 3) Helen MacLachlan will continue to work for TRA on her own time; 4) and to serve as Assistant Secretary; 5) Mrs. Kraft, at Sagamore Hill, will also continue working for TRA in her own time. The TRA recognizes that circumstances and staffing arrangements will

change with the passage of time.] "The points set forth above are consequently to be understood as constituting, so far as detail is concerned, merely the working basis on which the two parties start out together. In a broader sense, however, we would hope that they might serve as a pattern of the spirit and intention of cooperation between the parties, to be carried on, to mutual benefit, for a long time to come. (TRA Executive Committee Minutes)

National Park Service Acting Director Hillory Tolson to Ronald Lee, November 19, 1963

Subject: $500,000 donation to National Park Trust Fund from Theodore Roosevelt Association

Final arrangements are now being made, through the Treasury Department, to invest the subject donation in the best interest of the Trust Fund. The income for the first year has been tentatively earmarked for possible use in carrying out your plan to make Old Orchard at Sagamore Hill available for public use sometime in the future....However, the matter will be considered again when such income becomes available in the light of the then obtaining overall financial situation. It should be understood that the income for the first year will not be available until November or December of 1964, and we have no good way of estimating now just how much that will be.

While we are tentatively willing to go along with your proposal to use the first year's income from this trust fund investment at Sagamore Hill, as discussed above, we feel that the area's needs should be met from appropriated funds to the fullest extent possible. (Text reproduced in full. NARA – Philadelphia, Entry 413, NPS Northeast Office, General Correspondence)

Theodore Roosevelt Association Executive Committee Minutes, May 20, 1967

Mr. Dyer reported on the constructive use that the Park Service is making of the Advisory Committee. This Committee was formed to advise the Park Service on appropriate ways to spend the interest on the $500,000 donation of securities that accompanied the gift.... [As a result, Sagamore Hill will be pointed for 1st time in 5 years and] ways to improve the exhibits in Old Orchard are continuously being investigated.

Wayne P. Veach (National Park Service Mechanical Engineer/Division of Maintenance): Memorandum to Regional Director, December 6, 1967

The Theodore Roosevelt Association suggestion that this work [replacement of heating system at Canteen and Souvenir Shop] be accomplished as a Trust Fund item is approved by the Park. (NARA- Philadelphia, National Park Service Northeast Office papers)

National Park Foundation: Fund Data Sheet, 1969

NATIONAL PARK FOUNDATION - Special Fund

DONOR: Theodore Roosevelt Association

FUND NAME: Theodore Roosevelt Birthplace and Sagamore Hill Fund

DATE AND AMOUNT: 1962 - $500,000

PURPOSE AND/OR RESTRICTION:

shall be utilized only for the purposes of the historic sites established pursuant to Public Law 87-547, an act to authorize establishment of the Theodore Roosevelt birthplace and Sagamore Hill national Historic Sites (n.d., but with handwritten note dated February 12, 1969: see below. Text quoted in full. NPF Files)

National Park Foundation: Marginal Note, February 12, 1969

Discussion with R R [illeg.]. He takes position that since the original fund of $500,000 was received from endowment funds of Theodore Roosevelt Association (see public law following), the principal sum should be classified by the Foundation as an endowment fund. This seems reasonable. [signature illegible]. (Handwritten note on National Park Foundation fund data sheet: see above. NPF Files)

Theodore Roosevelt Association Executive Committee Minutes, February 19, 1972

Mr. Pell next reported on his investigations into the income the Park Service is receiving on the $500,000, endowment the Association provided. The $500,000, is still intact and has been invested through the Riggs National Bank. It is providing an income which is decreasing each year and now amounts to less than 1% per annum." [A committee is set up to investigate with Conrad Wirth and Riggs Bank.]

Theodore Roosevelt Association Executive Committee Minutes, December 2, 1972

[The Theodore Roosevelt Association discussed the National Park Service's new environmental education center at the Theodore Roosevelt Birthplace; Conrad Wirth is "greatly displeased."] Mr. Wirth plans to write a letter to the head of the National Park Service pointing out that these were historic houses given with the understanding that they should remain so and that the Government should return these houses and the money given them if they did not intend to preserve them.

Robert M. Landau (Director, National Park Service Office of Advisory Commissions): Briefing Statement, May 14, 1973

Through its [the TRA's] efforts, the Birthplace and Sagamore Hill were donated to the United States in 1962 as National Historic Sites, together with a $500,000 endowment. The interest from the donation is utilized to defray costs of administration of the two sites and amounts to not more than 5 percent of the annual operating budget. An additional $500,000, together with income from dues, constitutes a trust fund, the income from which is given to Harvard University in connection with the Roosevelt papers donated to the University Library. (Appendix to "Briefing Statement for Theodore Roosevelt Birthplace and Sagamore Hill National Historic Sites," May 14, 1973, p. 22)

P. James Roosevelt: Memorandum to Theodore Roosevelt Association Executive Committee, July 2, 1973

Jerry Wagers has consented to attend a meeting of the Theodore Roosevelt Association on Saturday, August 25th in the morning.

Mr. Wagers would like to discuss a solution to the barricade problem at Sagamore Hill. He would also like to discuss various potential uses for the income of the fund that we gave to the National Park Foundation. There is no longer an Advisory Committee, per se. Therefore the TRA will assume Advisory Committee functions as long as it pleases the Park Service to consult with us.

For the above reasons I am naturally anxious to have as good a turnout as we can.... (Included in TRA Executive Committee Minutes)

Theodore Roosevelt Association Executive Committee Minutes, August 25, 1973

Mr. Jerry Wagers of the National Park Service reported on the projects completed or under contract for both the Birthplace and Sagamore Hill....Mr. Wagers further discussed activities and projects under consideration for this year for both Sagamore Hill and the TR Birthplace....

Mr. Dave Dane of the National Park Service then gave a detailed explanation of the expenditures and plans for both sites....Mr. Wagers said the restoration [of wallpaper in the north room] would probably be expensive and that it would be something in the order of $20,000. He said further that before any such restoration was attempted, the concurrence of the Association would be needed....The aforementioned items [copying of stereographs and reweaving of oriental screen] are those which endowment funds would be used and are attached as Appendix III....

...Mr. Wagers said the National Park Foundation which administered the endowment funds would like to have the concurrence of the group who had contributed to the fund and in this case that would be the Theodore Roosevelt Association. He said that while a letter was not necessary, the indication of the Executive Committee that the planned expenditure of funds appropriated was all the indication they needed....Mr. Roosevelt said the Association enthusiastically approved of the expenditures as previously outlined excluding the wallpaper in the north room and would be happy to entertain that suggestion when a better idea was obtained of its costs. Motion was made, seconded and carried endorsing the program of the National Park Service in regards to the work planned at Sagamore Hill not including the wallpaper project in the north room. [The funding proposals for both Sagamore Hill and TRB are included as a two-page summary memo.]

Theodore Roosevelt Association Executive Committee Minutes, November 23, 1973

Mr. Roosevelt reported that in a telephone conversation with Mr. Wagers regarding paragraph 4 of the October 12th letter [of Roosevelt to Wagers], in which it was suggested that the T.R.A. might be able to make a loan to the Park Service of $11,600 as a "stop-gap" until that amount could be paid by the National Park Foundation, Mr. Wagers said that he did not need the funds as they could be obtained from the regular Park Service budget. This being the case, Mr. Roosevelt wished to know why the Park Service required the outside funds at all. Mrs. Gentry replied that some of the items for which they were to be spent were special, rather than routine maintenance and upkeep.

Theodore Roosevelt Association Executive Committee Minutes, March 30, 1974

Mr. Roosevelt said [following a meeting with an official of the American Security and Trust Co.] that for many years the $500,000 given by the Association was co-mingled with their other funds and mismanaged. A few years ago, under Mr. Pell's leadership, arrangements were made for them to manage the TRA gift separately. Mr. Roosevelt reported that after examining their statement he felt that they were doing very well with their funds. Mr. Roosevelt said that the current funds net worth is $672.000.

Theodore Roosevelt Association Executive Committee Minutes, July 9, 1975

At the suggestion of Mr. Roosevelt, Dr. Hendrickson began the discussion by submitting for the approval of the Executive Committee a list of recommendations for expenditures of the income of the National Parks Foundation endowment fund for Sagamore Hill and the Theodore Roosevelt Birthplace.

P. James Roosevelt (Theodore Roosevelt Association President): Letter to John L. Bryant, Jr. (Assistant Secretary, National Park Foundation), August 15, 1975

On July 9, 1975, the Executive Committee of the Theodore Roosevelt Association met with New York Group Superintendent William H. Hendrickson and Unit Managers James Brown and Robert Nash of the National Park Service to discuss recommendations for the expenditure of some of the interest monies from the Theodore Roosevelt Birthplace and Sagamore Hill Endowment Fund managed by the National Park Foundation. Projects and expenditures as outlined and explained below, which will be submitted with detailed information by the National Park Service to the National Park Foundation, were approved by the unanimous vote of the Theodore Roosevelt Association Executive Committee, and are hereby recommended to the Board of the National Park Foundation for approval. [This is followed by a five-page detailed memorandum describing $40,688 of expenditures.] (Included in TRA Executive Committee Minutes)

Historic Resources Management Plan, December 1975

[The Act] authorized the acceptance [of the two properties and] provided for the acceptance from the Theodore Roosevelt Association of a $500,000 endowment fund, of which the interest will be utilized for the purposes of the historic sites established by the Act. Also provided for was the establishment of an advisory committee.... [This was abolished in 1973, and currently National Park Service representatives] meet regularly with members of the Theodore Roosevelt Association Executive Committee and both groups are kept apprised of each others [*sic*] plans, goals and objectives.

Additionally, proposals for expenditure of endowment interest funds are reviewed jointly, enabling both organizations to present unified recommendations for the consideration of the National Park Foundation." (pp. 13-14)

TR Birthplace NHS: "Request for Endowment Funds FY 1978," August 17, 1977

At two separate meetings in August and November 1976, the Theodore Roosevelt Association's Executive Committee endorsed National Park Service requests for a total of $81,704.75 for the project. (In TRA Executive Committee Minutes)

Theodore Roosevelt Association Executive Committee Minutes, August 17, 1977

The endowment originally in amount of about $500,000, was donated by the T.R.A. at the time of the transfer of the sites to the N.O.S. in the 1960's. All requests to the Foundation by N.P.S. for expenditures of income must be approved by the T.R. Association before submission to the National Park Foundation....

Mr. Roosevelt [P. James Roosevelt] noted that The National Park Foundation would feel more comfortable if funds were spent within the year requested and on the project desired. The money earns interest as long as it is kept in the National Park Foundation account.

Theodore Roosevelt Association Executive Committee Minutes, July 24, 1978

At the request of President Hogan, Mr. P. James Roosevelt reviewed the history of the endowment held by the National Park Foundation in Washington, D.C. He related that when the Theodore Roosevelt Association gave the Sagamore Hill and T. R. Birthplace properties to the National Park Service in 1963, the Association at the same time also donated an endowment worth $500,000 for projects at both sites. This endowment was subsequently turned over to the National Park Foundation, a foundation established in 1967 to work on an independent basis in cooperation with the Department of the Interior and Park Service. Mr. Roosevelt said that he had worked closely with the National Park Foundation, which has maintained close ties with the T.R.A. The endowment donated by the T.R.A., and now administered by this foundation, is the largest single component of the holdings of the National Park Foundation. The procedure for expenditure of income from the endowment is that proposals are first submitted for approval to the Executive Committee of the T.R.A., and if approved these requests are forwarded with T.R.A. endorsement to the National Park Foundation for final approval. Mr. Roosevelt expressed confidence in this arrangement, and praised the work of Mr. John L. Bryant, Jr., the President of the National Park Foundation....

...the Executive Committee voted unanimously to endorse the grant requests..., as presented by the Park Service,...and to communicate this endorsement to the National Park Foundation in Washington. [Curator Kahn and Superintendent Pearson present endowment fund requests for TRB, FY 79, previously] presented to the TRA Executive Committee on July 24, 1978, and ratified by the Executive Committee for forwarding to the National Park Foundation in Washington. The National Park Foundation manages an endowment donated by the TRA. The endowment income is used each year to fund projects at Sagamore Hill and T.R. Birthplace. [There follows discussion of carrying some funds forward. Superintendent Pearson] said that he had

discussed this matter with both Mr. John Bryant of the National Park Foundation and Mr. Gable, and both were agreeable to this arrangement. (Theodore Roosevelt Birthplace Committee Minutes, September 7, 1978, in TRA Minutes)

Theodore Roosevelt Association Executive Committee Minutes August 9, 1979

Income may be used only for projects at the two houses, and all projects are reviewed and passed upon each year by the Executive Committee of the Association.

SAHI: Statement for Management, Approved January 7, 1980

The Act [of 1962] also permitted the National Park Trust Fund (superceded [*sic*] by the National Park Foundation) to accept donations from the Theodore Roosevelt Association, which funds must be utilized only for purposes of Sagamore Hill and TR Birthplace NHS. The National Park Service and the Theodore Roosevelt Association present recommendations to the Board of the National Park Foundation for the expenditure of these funds. Control of the endowment fund rests with the Board of the National Park Foundation. (p. 6.)

Theodore Roosevelt Association Executive Committee Minutes, August 7, 1980

The representatives of the National Park Service presented their proposals for the use of income of the endowment which the Theodore Roosevelt Association donated to the National Park Foundation for the use of Sagamore Hill and Theodore Roosevelt Birthplace. Superintendent Pearson, Miss Jung, and Miss Dusach spoke for TR Birthplace....The Park Service requested that the Committee approve a reallocation of the $7,500.00 for fiscal 1981 to install new security systems....Mrs. Rose moved to approve the reallocation plan, Mr. Johnston seconded the motion, and it was unanimously passed....Mr. Hite and Mr. Roth then presented the proposals for work at Sagamore Hill, projects involving wallpaper reproduction, fabric replacement, upholstery, acquisitions, brass and metal restoration, book restoration, taxidermy, paper conservation, frame restoration, and public relations....The total amount requested was $40,000.00. Mrs. Kraft moved endorsement of the proposals, Mss Roosevelt seconded, and the motion was unanimously passed. Dr. Gable remarked that Mr. Roth's presentation was "brilliant." The Committee instructed the Executive Director to communicate its endorsement of the proposals for TR Birthplace and Sagamore Hill to the officers of the National Park Foundation in Washington....

Theodore Roosevelt Association Executive Committee Minutes, August 1, 1981

> President Johnston asked Mr. P. James Roosevelt to explain the purpose of the National Park Foundation TRA Endowment. Mr. Roosevelt stated that the endowment was established by the TRA in order to provide funds for restoration and rehabilitation at Sagamore Hill and the T.R. Birthplace and, therefore, not be a burden to the taxpayers. The National Park Service requests are to be submitted to the TRA Executive Committee for review, and approval of expenditures from the fund for these sites. [There follows a detailed discussion of presentations by Duane Pearson of proposed expenditures for the Birthplace (moved, seconded, and approved) and Loretta Schmidt for Sagamore Hill.] Discussion followed, and Mrs. Rose questioned the request for linoleum reproduction insofar as documenting whether linoleum was actually in the kitchen at the time the family resided at Sagamore Hill. It was agreed that $1,000 be allocated for further research as to this item, rather than the requested $5,000. [With this modification and a corresponding increase in the allotment for furniture and rug restoration, the proposal was moved, seconded, and approved.]

Theodore Roosevelt Association Executive Committee Minutes, May 8, 1982

At a meeting also attended by Herbert Cables, North Atlantic Regional Director, Mr. Pearson supported by Dr. Gable suggests a written agreement with National Park Service codifying institutional relationship.

> Various aspects of the relationship between the TA and the NPS were reviewed, including the procedures relating to the endowment donated by the Association and administered by the National Park Foundation in Washington. Mr. P. James Roosevelt outlined the history of the endowment. He said that all expenditures from endowment income had to be approved in advance by the Association....The Executive Director noted that the records of the Association are quite clear on all aspects of the relationship between the NPS and the TRA, but that due to changes in policy and personnel in the NPS from time to time there is confusion on some points...." [Superintendent Loretta Schmidt then presented a proposal to reprogram some expenses for 1982, which was moved, seconded, and approved.]

Theodore Roosevelt Association Executive Committee Minutes, August 11, 1982

> [Duane Pearson, Superintendent of NY City Sites, presented Birthplace funding requests] and discussed each of the requests. [They were approved, with the proviso that one – a proposal to fund a play called "Teddy Roosevelt" – would be cut if the NPF failed to raise $5,100.] Miss Loretta Schmidt, Superintendent at Sagamore Hill, presented the proposals totaling $18,000 as set forth in the request dated August 7, 1982, and discussed each item in detail....Discussion followed concerning the above requests. A motion was made, seconded and carried approving the requests totaling $21,300, which total sum is to be expended from endowment interest without touching capital monies.

Theodore Roosevelt Association Executive Committee Minutes, December 4, 1982

[The National Park Service's first draft of the proposed Cooperative Agreement is discussed, and "numerous objections" are voiced.] Apparently the National Park Service disclaims a 1962 guarantee of office space being allocated for the TRA; object to having to obtain approval of the TRA for handling the income from the TR Endowment Fund, claiming they never accepted this procedure; and state that each time a new Superintendent or Supervisor is appointed at the sites problems arise, thereby requiring an agreement. Due to the objections, it was agreed that a meeting be arranged with Mr. John Bryant to discuss the matter of the handling of the income from the endowment fund....No action, therefore, is taken at this time with respect to this proposed Cooperative Agreement.

SAHI Executive Committee Minutes, August 17, 1983

[Duane Pearson, NYC Sites Superintendent, presents TRB funding proposals, totaling $20,000 and] discussed each of the seven requests. There followed discussion with respect to each of the items, in particular "Item No. 3 – Reproduction of Two Bronze Chandeliers...." The proposals were approved except for the chandeliers, "to be held in abeyance pending submission of a further proposal....[Loretta Schmidt then presented requests totaling $20,000 for Sagamore Hill.] Discussion was had relative to each of the five requests presented..., [which were approved].

John Gable: "Report to the Executive Committee," April 13, 1984

In negotiating this agreement [the Cooperative Agreement], and working with the National Park Service, my own objective has been to maintain and support those rights which the TRA has traditionally claimed, including the right to review the annual funds for the sites from the National Park Foundation....Cooperative agreements of this kind are, I am told, now part of the policy of the National Park Service, and I welcomed the opportunity to codify and put down in writing many things which were until now largely a matter of tradition, and which have been from time to time called into question and dispute. [The Theodore Roosevelt Association Executive Committee reviews the draft Cooperative Agreement.] Judge Hogan stated that he felt that the Association had given so much to the National Park Service by its gifts, i.e., Sagamore Hill, T.R. Birthplace, Roosevelt Island, as well as a generous endowment... [that he wanted to know why it was really necessary].

Theodore Roosevelt Association Executive Committee Minutes, June 23, 1984

> [The Theodore Roosevelt Association Executive Committee meets with Herbert Cables (Regional Director), Robert Mahoney (Superintendent, Manhattan Sites), John Lancos (Site Supervisor, TRB), and Loretta Schmidt to discuss the cooperative agreement and present a revised draft.] Mr. Schafer asked if the NPS currently had any complaints with the policies of the TRA. Mr. Cables said that he knew of none.

John Gable (?): Annotated Agenda for Theodore Roosevelt Association Executive Committee Meeting, August 8, 1984

> After proposals presented, the Executive Committee should discuss and ratify [endowment fund proposals], making any modifications deemed necessary. ("Annotated Agenda," presumably by Gable for the President, in TRA Executive Committee Minutes)

"Cooperative Agreement between the National Park Service and the Theodore Roosevelt Association," signed December 26, 1984

The agreement contains 13 "Whereas clauses," drafted by and inserted at the urging of the Theodore Roosevelt Association. The sixth and seventh, following mention of the donation of Sagamore Hill, the Birthplace, and Old Orchard, read:

> WHEREAS, in accordance with the Act entitled, "An Act to Create a National Park Trust Fund Board," and for other purposes, "approved July 10, 1935 (49 Stat. 477)" as amended, the National Park Trust Fund Board accepted $500,000 from the Theodore Roosevelt Association for the purposes of the historic sites established pursuant to this Act; and WHEREAS, the National Park Trust Fund Board was succeeded by the National Park Foundation pursuant to P.L. 90-209 (81 Stat. 656; 16 U.S.C. 19e to 19n)…[the Theodore Roosevelt Association agrees to give consideration to "assisting the Service to protect, administer, and develop Theodore Roosevelt Birthplace and Sagamore Hill National Historic Sites," and the NPS agrees, among other things, to] submit to the Association for review and concurrence, the annual Service funding proposal for the Theodore Roosevelt Endowment in accordance with the Act of July 25, 1962.

SAHI: Annual Report, 1985

> The Board [of the TRA] met here [Old Orchard] in August to review the NPF endowment proposals with Regional Director Cables and the Superintendents and curators of Sagamore Hill and Manhattan Sites' TR Birthplace. (Harpers Ferry Center, SAHI Box: Misc.)

John Gable: "The Sagamore Hill Committee and the Prologue of the Past," October, 1988

In 1963 the Association donated both Theodore Roosevelt Birthplace in Manhattan and Sagamore Hill in Oyster Bay to the federal government to be operated an maintained by the National Park Service....The TRA also donated an endowment of $500,000 for both sites....As noted, the Association gave an endowment of $500,000 for both sites in 1963. This sum was half of the TRA's endowment at the time. Eventually this endowment for the two sites was turned over to the National Park Foundation in Washington....The "Theodore Roosevelt Association" endowment managed by the National Park Foundation – not to be confused with the present endowment of the TRA – is the largest endowment in the NPF, and one of the two largest funds administered by the NPF. The principal of that endowment is nonexpendable by the terms of the donation by the TRA. The principal was at over $800,000 in 1987. A portion of the earned income is allocated each year for the use of each of the two sites, and some funds are held in reserve for emergencies or special projects of magnitude. According to the terms set by the National Park Foundation, the Executive Committee must approve the expenditure of the funds made available to the sites each year. This mode of operation was confirmed in the Cooperative Agreement of 1984, Article II, section i. It has been the custom for some years for there to be a combined meeting of the two site committees and the Executive Committee once each year to receive, review, and pass on the proposals for that year made by the National Park Service for each site. Monies are divided equally between the sites, unless there is some pressing need at one site. The National Park Foundation has always and in every case accepted the final recommendation of the TRA on appropriations. The existence of this Washington endowment, as well as the annual appropriation in the TRA budget for each site, place the TRA and the NPS at both sites in a unique and important partnership. (Typescript, SAHI, Folder A42 "Cooperating Associations - Theodore Roosevelt Association")

APPENDIX G

CHART OF STAFFING, 1961

(From "Area Investigation Report," 1961)

SAGAMORE HILL

Position & Grade	MY	1st YR.		2nd YR.		3rd YR.		4th YR.		5th YR.
MANAGEMENT and PROTECTION										
Superintendent, GS-11	1	7560	1	7560	1	7820	1	7820	1	8080
Administrative Ass't., GS-7			1	5520	1	5685	1	5850	1	6015
Clerk-Stenographer, GS-4	1	4040	1	4145	1	4250	1	4355	1	4460
Historian, GS-9	1	6435	1	6600	1	6765	1	6930	1	7095
Ranger, GS-7	1	5355	1	5520	1	5685	1	5850	1	6015
Park Guides, GS-4	1	4040	2	8185	2	8395	2	8605	2	8815
Seasonal Rangers, GS-4	1	4040	1	4040	2	8080	2	8080	2	8080
Lapse		-1997		-		-		-		-
Total Personal Services	6	29,473	8	41,570	9	46,680	9	47,490	9	48,560
Other Direct Expenses		2,665		2,800		3,100		3,300		3,500
		32,138		44,370		49,780		50,790		52,060
MAINTENANCE and REHABILITATION										
Foreman III (Maintenance)	1	6240	1	6240	1	6240	1	6240	1	6240
Maintenanceman	1	5200	1	5200	1	5200	1	5200	1	5200
Laborers	2	8000	2	8000	3	12,000	4	16,000	4	16,000
Museum Curator, GS-5	1	4345	1	4510	1	4675	1	4840	1	5005
Seasonal Laborers	1.5	6000	1	6000	1	6000	1	6000	1	6000
Lapse		-1890		-		-		-		-
Total Personal Services	6.5	27,895	6	29,950	7	34,115	8	38,280	8.	38,445
Other Direct Expenses		10,000		12,000		14,000		16,000		18,000
		37,895		41,950		48,115		54,280		56,445
TOTAL		70,033		86,320		97,895		105,070		108,505

APPENDIX H

STAFFING AT SAGAMORE HILL AS RECOMMENDED IN 1964

(From tables attached to Memo, Special Committee to Study Staffing to Regional Director, May 6, 1964: NARA – Philadelphia, National Park Service Northeast Office, Administrative Correspondence 1953-68, Folder: Ops Program, Northeast Region – 1964)

I. PERMANENT STAFF

A: M & P

	Administra-tive Asst.			Management Assistant			Stenog-rapher			Historian			Museum			Guide			Superviso-ry Ranger			Ranger			Total		
	E	S	L	E	S	L	E	S	L	E	S	L	E	S	L	E	S	L	E	S	L	E	S	L	E	S	L
Proposed by Superintendent	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	0	2	2	1	1	1				6	8	8
Committee Recommen-dations	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	0	2	2	1	1	1	Elev. Operator [*sic*]			6	8	8

B: M & R

	Foreman II			Laborer			Janitor & Charwoman			Total		
	E	S	L	E	S	L	E	S	L	E	S	L
Proposed by Superintendent	1	1	1	2	2	2	2	2	2	5	5	5
Committee Recommendations	1	1	1	2	2	2	2	2	2	5	5	5

II. SEASONAL STAFF

	M & P									M & R					
	Fire Control			Guide			Total M & P						Grand Total		
	E	S	E	S	L	L	E	S	L	E	S	L	E	S	L
Proposed by Superintendent	0	.2	.2	0	.5	.5	0	.7	.7	0	0	0	.7	.7	.7
Committee Recommendations	0	.2	.2	0	.5	.5	0	.7	.7	0	0	0	.7	.7	.7

APPENDIX I

EXISTING AND PROPOSED STAFFING IN 1970

(From *Interpretive Prospectus*, 1970)

Existing	Number	M.Y.	**Proposed**	Number	M.Y.
Management Assistant (GS-11)	1	1	Unit Manager (GS-11)	1	1
Historian (GS-9)	1	1	Historian (GS-9)	1	1
Park Curator (GS-7)	1	1	Park Curator (GS-9)	1	1
			Park Technician (GS-7)	1	1
Park Technician (GS-4 or 5)	1	1	Park Aid/Technician (GS-4 or 5)	1	1
Seasonals (GS-4)	10	4.3	Seasonals (GS-4)	8	3.5
TOTALS	**14**	**8.3**	**TOTALS**	**18**	**13.5**

APPENDIX J

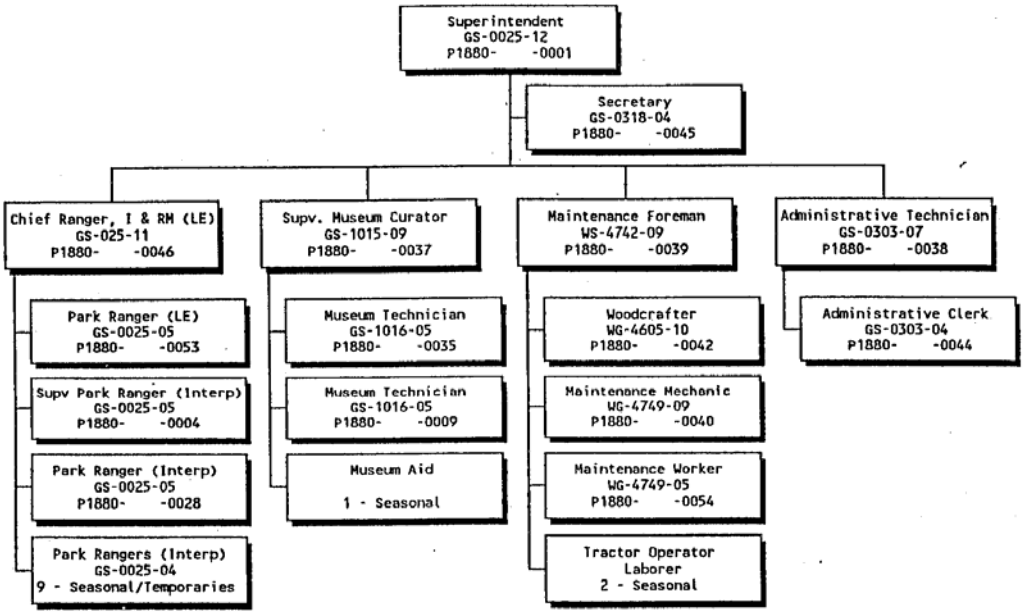
ORGANIZATIONAL CHART, 1993

(From SAHI: Central Files, Folder A6435)

SAGAMORE HILL NATIONAL HISTORIC SITE

ORGANIZATIONAL CHART

FISCAL YEAR 1993



Parkwide

Submitted: Superintendent 7/15/93 Date

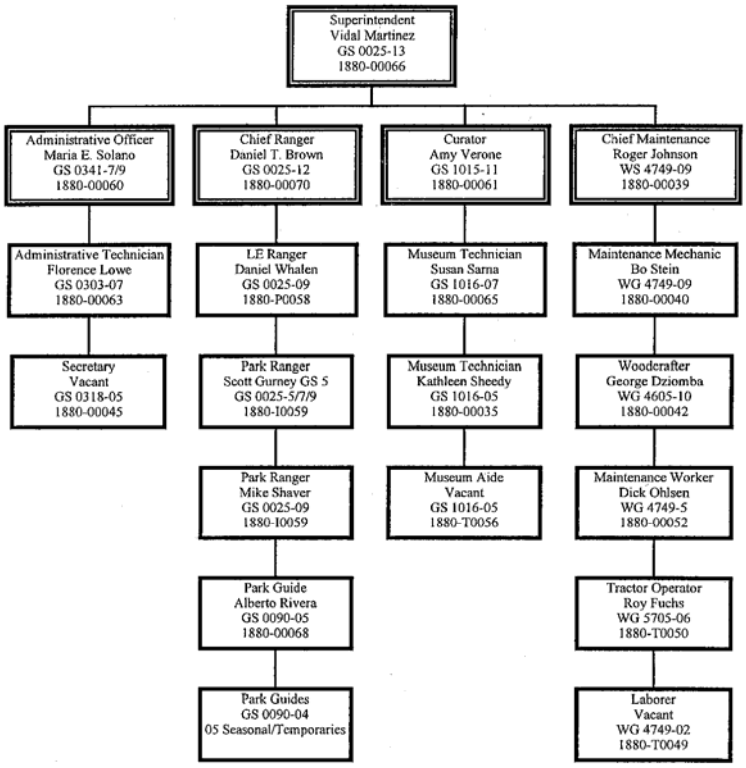
Approved: Regional Director 9/8/93 Date

APPENDIX K

ORGANIZATIONAL CHART, 1998

From SAHI: Central Files, Folder

Sagamore Hill National Historic Site
ORGANIZATIONAL CHART
Fiscal Year 1998



Parkwide
As of 01/26/98 Current cost for personnel services: $779,348
Sagamore Hill NHS Program Authorization: $896,000
Total FTE: 20

Submitted: Vidal Martinez, **Superintendent Date:** 1/26/98

APPENDIX L

COOPERATIVE AGREEMENT WITH THEODORE ROOSEVELT ASSOCIATION, 1984

C. 1600-5-000

COOPERATIVE AGREEMENT BETWEEN
THE NATIONAL PARK SERVICE AND
THE THEODORE ROOSEVELT ASSOCIATION

This Agreement, made this 26th day of December, 1984, between the National Park Service, hereinafter referred to as the "Service" and the Theodore Roosevelt Association, hereinafter referred to as the "Association":

W I T N E S S E T H:

THAT WHEREAS, The Act of July 25, 1962 (P.L. 87-547; 76 Stat. 217), provides for the preservation in public ownership of historically significant properties associated with the life of Theodore Roosevelt (the Theodore Roosevelt House, 28 East 20th Street, New York City, New York, and Sagamore Hill, Cove Neck, Oyster Bay, Long Island, New York, together with the furnishings and other contents of the structures); and

WHEREAS, the Association reconstructed the birth site of President Theodore Roosevelt, at East 20th Street, New York City; and

WHEREAS, The Association restored the Long Island home of the twenty-sixth President at Sagamore Hill, Oyster Bay, New York, which was dedicated and opened as a public site in 1953; and

WHEREAS, the Association, for the purpose of preserving historically significant properties in public ownership associated with the life of President Theodore Roosevelt, gave the Theodore Roosevelt Birthplace and Sagamore Hill, together with furniture, furnishings, historical artifacts , and other materials to the Federal Government to be administered by the Secretary of the Interior, and the National Park Service; and

WHEREAS, the Association also gave other property known as "Old Orchard", the former home of Theodore Roosevelt, Junior, contiguous to President Theodore Roosevelt's Sagamore Hill home, including buildings; and

WHEREAS, in accordance with the Act entitled, "An Act to Create a National Park Trust Fund Board", and for other purposes, "approved July 10, 1935 (49 Stat. 477)" as amended, the National Park Trust Fund Board accepted $500,000 from the Theodore Roosevelt Association for the purposes of the historic sites established pursuant to this Act; and

WHEREAS, the National Park Trust Fund Board was succeeded by the National Park Foundation pursuant to P.L. 90-209 (81 Stat. 656; 16 U.S.C. 19e to 19n); and

WHEREAS, the Secretary of the Interior is directed to administer, protect, and develop the Theodore Roosevelt Birthplace and Sagamore Hill National Historic Sites in accordance with provisions of the Act of August 25, 1916 (39 Stat. 535; 16 U.S.C. 1) and the following, as amended and supplemented; and

WHEREAS, P.L. 87-547 directed that the Theodore Roosevelt Association, having by its patriotic and active interest preserved for posterity these important historic sites, buildings, and objects, should be consulted by the Secretary of the Interior in the establishment of an Advisory Committee or Committees for matters relating to the preservation, development, and management of the Theodore Roosevelt Birthplace and Sagamore Hill National Historic Sites; and

WHEREAS, the Service and the Association, as successor to the Advisory Committee, have cooperated since 1962 in matters affecting the preservation, development, and management of the Theodore Roosevelt Birthplace and Sagamore Hill National Historic Sites without the benefit of cooperative agreement or other documentation of mutual understanding; and

WHEREAS, the Theodore Roosevelt Association, chartered by Congress, is a national historical public service organization dedicated to preserving the ideals and memory of the twenty-sixth President of the United States with membership in all the states of the Union; and

WHEREAS, both the Service and the Association have worked harmoniously over the many years in furtherance of their mutual and respective purposes for future generations of Americans; and

WHEREAS, it is the desire of the Service and the Association to reduce to writing the responsibilities, duties and privileges of each to the end that the cooperative and harmonious relationship shall continue:

NOW, THEREFORE, in consideration of the foregoing and pursuant to the authority contained in Public Law 97-258 (31 U.S.C. 6305), and in consideration herein expressed, the said parties have covenanted and agreed, and by these presents do covenant and agree to and with each other as follows:

ARTICLE I. The Association does agree for itself, its successors and assigns that consideration will be given to assisting the Service to protect, administer, and develop Theodore Roosevelt Birthplace and Sagamore Hill National Historic Sites by such means as the Association decides, including but not limited to:

a. By providing an annual appropriation for the use of the Sagamore Hill and Theodore Roosevelt Birthplace Committees of the Association in their support of the sites, and/or by soliciting support for the sites from public and private sources. Such obligation, however, shall be understood not to bind the Association to expend any sum in excess of revenues received by it or designated by it for such purposes.

b. Assisting the Service in the acquisition of appropriate furnishings, museum objects, memorabilia, photographs, and related items for donation and/or purchase, and seeking to provide the resources for their purchase, restoration, maintenance, display, storage and professional research and documentation of same.

c. Assisting the Service by supporting the development of an educational program for the sites, which could include the preparation of school previsit kits, audiovisual materials, publications, and other materials, and the sponsorship of lectures, walking tours, symposia, and other programs.

d. Assisting the Service in reaching a larger and more diverse visitor population for Theodore Roosevelt Birthplace National Historic Site by supporting the development of a public relations program which could include the design and production of posters for bus and subway public service announcements, paid listings in various newspapers, magazines, guidebooks, etc., and support of increased print runs of the Site brochure for free distribution through the New York City Visitors and Convention Bureau, hotels, motels, travel agents, and various museums and other attractions and by other means as deemed worthwhile.

e. Utilizing its status as a not-for-profit corporation to assist the Service as requested, whenever such legal status would facilitate site preservation, development, and management, as for example, in the acquisition of public or foundation grants or in the sponsorship of efforts to utilize publicly funded work-study or employment programs.

f. Assisting the Sites to obtain specialized professional services when such services are not available within Site staff or when such assistance is not readily available from other Service offices. Such services might include architectural and engineering assistance, conservation assistance, writer/photographer/editorial assistance, education specialist assistance, research assistance, etc.

ARTICLE II. The Service agrees on behalf of the United States of America that:

a. It will protect, administer, and develop Theodore Roosevelt Birthplace and Sagamore Hill National Historic Sites according to plans developed through a documented process of public participation, commensurate with available appropriated funds.

b. It will provide technical and professional staff to preserve, protect, maintain, and operate the Sites in accordance with Statements for Management and other approved operating plans, commensurate with available appropriated funds.

c. It will support the work of the Association at the sites by authorizing the use of facilities for the Association's annual meeting and dinner, without charge, at such times and such locations and upon such terms and conditions as determined appropriate, in writing, by both the Service and the Association.

d. It will authorize the use of meeting rooms and facilities at the sites to support the work of the Association through meetings of the Association's Executive Committee, Board of Trustees, site subcommittees, the Annual TR Public Speaking Contest, special programs and the like, without charge, at such times and such locations and under such terms and conditions as determined appropriate, in writing, by both the Service and the Association.

e. It will authorize the Association to store its stocks of sales publications, without charge, at the sites as space is available at such times and such locations, and upon such terms and conditions as determined appropriate, in writing, by both the Service and the Association.

f. It will authorize the Association to store its holdings of archival materials, books, Roosevelt memorabilia, artifacts, and the like, without charge, at the sites at such times and such locations and upon such terms and conditions as determined appropriate, in writing, by both the Service and the Association.

g. It will authorize the Association to utilize office space at the Theodore Roosevelt Birthplace National Historic Site, without charge, at such times and such locations and upon such terms and conditions as determined appropriate, in writing, by both the Service and the Association.

h. It will provide the Association, upon request, black and white copies of photographs in the Sites' collections at cost for the reproduction of negatives and prints.

i. It will submit to the Association for review and concurrence, the annual Service funding proposal for the Theodore Roosevelt Endowment in accordance with the Act of July 25, 1962.

ARTICLE III. The Association and the Service agree that:

a. During the performance of this Agreement, the participants agree to abide by the terms of Executive Order No. 11246, as amended by Executive Order No. 11375, on nondiscrimination and will not discriminate against any person because of race, color, religion, sex, or national origin. The participants will take affirmative action to ensure that applicants are employed without regard to their race, color, religion, sex, or national origin.

b. No member of or delegate to Congress, or resident Commissioner, shall be admitted to any share or part of this agreement or to any benefit that may arise therefrom, but this provision shall not be construed to extend to this Agreement if made with a corporation for its general benefit.

c. This agreement shall remain in full force and effect for a term of five (5) years from the date of execution hereof, unless sooner terminated as hereinafter provided.

d. This agreement may be terminated by either party upon sixty (60) days prior written notice to either party, provided, however, upon such termination funds previously committed or activities previously authorized, in writing, by both the Service and the Association for any given project shall not be withheld and each such project shall be completed by the responsible party.

e. Nothing herein contained shall be construed as binding the Service to expend in any one fiscal year any sum in excess of appropriations made by Congress or administratively allocated for the purpose of this Agreement for the fiscal year, or to involve the Service in any contract or other obligation for the further expenditure of money in excess of such appropriation or allocations.

f. No transfer or assignment of this Agreement or of any part thereof or interest therein, directly or indirectly, voluntary or involuntary, shall be made unless such transfer or assignment is first approved by both parties hereto in writing.

g. The rights and benefits conferred by this Agreement shall be subject to the laws of the United States governing the National Park Service and to the rules and regulations promulgated thereunder, whether now in force or hereafter enacted or promulgated, and nothing herein shall be construed as in any way impairing the general powers of supervision, regulation and control by the Service of property under its ownership or control.

h. For the purposes of this Agreement, written determinations and authorizations shall be executed for the Service by its Superintendents of the respective sites, and for the Association shall be by any of its duly authorized officers or Executive Director.

IN WITNESS WHEREOF, the Service and the Association have, on this day and year first written, caused these presents to be signed, sealed and delivered by their respective representatives thereunto duly authorized.

UNITED STATES OF AMERICA
DEPARTMENT OF THE INTERIOR
NATIONAL PARK SERVICE

By: _____
Regional Director
North Atlantic Region

WITNESSES:

By _____
By _____
Executive Director,
Theodore Roosevelt Association

THEODORE ROOSEVELT ASSOCIATION

By: _____

Title: President,
Theodore Roosevelt Association

APPENDIX M

MEMORANDUM OF AGREEMENT WITH THEODORE ROOSEVELT ASSOCIATION, 1995

WHEREAS, both the Service and the Association have worked harmoniously over the many years in furtherance of their mutual and respective purposes for future generations of Americans; and

WHEREAS, it is the desire of the Service and the Association to reduce to writing the responsibilities, duties and privileges of each to the end that the cooperative and harmonious relationship shall continue; and

WHEREAS, the Cooperative agreement between the Service and the Association, signed December 26, 1984, expired in 1989:

NOW, THEREFORE, in consideration of the foregoing and pursuant to the authority contained in Public Law 97-258 (31 U.S.C. 6305), and in consideration herein expressed, the said parties have covenanted and agreed, and by these presents do covenant and agree to and with each other as follows:

ARTICLE I. The Association does agree for itself, its successors and assigns that consideration will be given to assisting the Service to protect, administer, and develop Sagamore Hill National Historic Site by such means as the Association decides, including but not limited to:

a. Providing an annual donation for the use of the Sagamore Hill Committees of the Association in their support of the site, and/or by soliciting support for the site from public and private sources. Such obligation, however, shall be understood not to bind the Association to expend any sum in excess of revenues received by it or designated by it for such purposes.

b. Assisting the Service in the acquisition of appropriate furnishings, museum objects, memorabilia, photographs, and related items for donation and/or purchase, and seeking to provide the resources for their purchase, restoration, maintenance, display, storage and professional research and documentation of same.

c. Assisting the Service by supporting the development of an educational program for the sites, which could include the preparation of school pre-visit kits, audiovisual materials, publications, and other materials, and sponsorship of lectures, walking tours, symposia, and other programs.

d. Will provide the Superintendent of Sagamore Hill with an annual balance of available funding from the Theodore Roosevelt endowment fund at the National Park Foundation to determine projected proposals for preservation and maintenance needs of the site.

e. Utilizing its status as a not-for-profit corporation to assist the Service as requested, whenever such legal status would facilitate site preservation, development, protection, and fundraising, as for example, in endorsing the support of the "Friends of Sagamore Hill" volunteer group in the effort to facilitate fundraising campaigns and to utilize these funds exclusively for the benefit of the Sagamore Hill National Historic Site, and in the acquisition of public or foundation grants or in the sponsorship of efforts to utilize publicly funded work-study or employment programs.

f. Assisting the Site to obtain specialized professional services when such services are not available within Site staff or when such assistance is not readily available from other Service offices. Such services might include architectural and engineering assistance, conservation assistance, writer/photographer/editorial assistance, education specialist assistance, research assistance, etc.

ARTICLE II. The Service agrees on behalf of the United States of America that:

a. It will protect, administer, and develop Sagamore Hill National Historic Site according to plans developed through a documented process of public participation, commensurate with available appropriated funds.

b. It will provide technical and professional staff to preserve, protect, maintain, and operate the Sagamore Hill National Historic Site in accordance with Statements for

Management, General Management Plan and other approved operating plans, commensurate with available appropriated funds.

c. It will support the work of the Association at the Sagamore Hill National Historic Site by authorizing the use of facilities for the Association's annual meeting and dinner, without charge, at such times and such locations and upon such terms and conditions as determined appropriate, in writing, by both the Service and the Association.

d. It will authorize the use of meeting rooms and facilities at the Site to support the work of the Association through meetings of the Association's Executive Committee, Board of Trustees, Site subcommittees, the annual TR Public Speaking Contest, special programs and the like, without charge, at such times and such locations and under such terms and conditions as determined appropriate, in writing, by both the Service and the Association.

e. It will authorize the Association to store its stocks of sales publications, without charge, at the Sites as space is available at such times and such locations, and upon such terms and conditions as determined appropriate, in writing, by both the Service and the Association.

f. It will provide the Association, upon request, black and white copies of photographs in the Site's collections at cost for the reproduction of negatives and prints.

g. It will authorize the Association to store its holdings of archival materials, books, memorabilia, artifacts, and the like, without charge, at the Site at such times and such location and upon such terms and conditions as determined appropriate, in writing, by both the Service and the Association.

h. It will submit to the Association for review and concurrence, the annual Service funding proposal for the Theodore Roosevelt endowment fund at the National Park Foundation in accordance with the Act of July 25, 1962.

ARTICLE III. The Association and the Service agree that:

a. During the performance of the Agreement, the participants agree to abide by the terms of Executive Order No. 11246, as amended by Executive Order No. 11375, on nondiscrimination and will not discriminate against any person because of race, color, religion, sex, or national origin.

b. No member of or delegate to Congress, or resident Commissioner, shall be admitted to any share or part of this agreement or to any benefit that may arise therefrom, but this provision shall not be construed to extend to this Agreement if made with a corporation for its general benefit.

c. This agreement shall remain in full force and effect for a term of five (5) years from the date of execution hereof, unless sooner terminated as hereinafter provided.

d. This agreement may be terminated by either party upon sixty (60) days prior written notice to either party, provided, however, upon such termination funds previously committed or activities previously authorized, in writing, by both the Service and the Association for any given project shall not be withheld and each such project shall be completed by the responsible party.

e. Nothing herein contained shall be construed as binding the Service to expend in any one fiscal year any sum in excess of appropriations made by Congress or administratively allocated for the purpose of this Agreement for the fiscal year, or to involve the Service in any contract or other obligation for the further expenditure of money in excess of such appropriation or allocations.

f. No transfer or assignment of this Agreement or of any part thereof or interest therein, directly or indirectly, voluntary or involuntary, shall be made unless such transfer or assignment is first approved by both parties hereto in writing.

g. The rights and benefits conferred by this Agreement shall be subject to the laws of the United States governing the National Park Service and to the rules and regulations promulgated thereunder, whether now in force or hereafter enacted or promulgated, and nothing herein shall be construed as in any way impairing the general powers of supervision, regulation and control by the Service of property under its ownership or control.

h. For the purposes of this Agreement, written determinations and authorizations shall be executed for the Service by the Superintendent of the Sagamore Hill National Historic Site, and for the Association shall be by any of its duly authorized officers or Executive Director.

IN WITNESS WHEREOF, the Service and the Association have, on this day and year first written, caused these presents to be signed, sealed and delivered by their respective representatives thereunto duly authorized.

UNITED STATES OF AMERICA
DEPARTMENT OF THE INTERIOR
NATIONAL PARK SERVICE

By: Tulal MacFinee
Superintendent
Sagamore Hill National
Historic Site

WITNESSES:

By:

By: Daniel T. Brown

THEODORE ROOSEVELT ASSOCIATION

By: John A. Gable

Title: Executive Director

Corporate seal affixed JAG

APPENDIX N

MEMORANDUM OF AGREEMENT WITH THEODORE ROOSEVELT ASSOCIATION, 2001

Memorandum of Agreement Between
The National Park Service,
Sagamore Hill National Historic Site,
and
The Theodore Roosevelt Association

This Agreement, made the 12th day of January, 2001, between the National Park Service, hereinafter referred to as the "Service" and the Theodore Roosevelt Association, hereinafter referred to as the "Association."

Witnesseth:

THAT WHEREAS, The Act of July 25, 1962 (P.L. 87-547; 76 Stat. 217), provides for the preservation in public ownership of historically significant properties associated with the life of Theodore Roosevelt (Sagamore Hill, Cove Neck, Oyster Bay, Long Island, New York, together with the furnishings and other contents of the buildings); and

WHEREAS, the Association restored the Long Island Home of the twenty-sixth President at Sagamore Hill, Oyster Bay, New York, which was dedicated and opened as a public site in 1953; and

WHEREAS, the Association, for the purpose of preserving historically significant properties in public ownership associated with the life of President Theodore Roosevelt, gave Sagamore Hill, together with furniture, furnishings, historical artifacts, and other materials to the Federal Government to be administered by the Secretary of the Interior, and the National Park Service; and

WHEREAS, The Association also gave the property known as "Old Orchard," the former home of Theodore Roosevelt, Junior, contiguous to President Theodore Roosevelt's Sagamore Hill Home, including buildings; and

WHEREAS, in accordance with the Act entitled, "An Act to Create a National Park Trust Fund Board," and for other purposes, "approved July 10, 1935 (49 Stat. 477)" as amended, the National Park Trust Fund Board accepted $500,000 from the Theodore Roosevelt Association for the purposes of the historic sites established pursuant to this Act; and

WHEREAS, the National Park Trust Fund Board was succeeded by the National Park Foundation pursuant to P.L. 90-209 (81 Stat. 656, 16 U.S.C. 19e to 19n); and

WHEREAS, The Secretary of the Interior is directed to administer, protect, and develop the Sagamore Hill National Historic Site in accordance with provisions of the Act of August 25, 1916 (39 Stat. 535; 16 U.S.C. 1) and the following, as amended and supplemented; and

WHEREAS, P.L. 87-547 directed that the Theodore Roosevelt Association, having by its patriotic and active interest preserved for posterity this important historic site, buildings,

and objects, should be consulted by the Secretary of the Interior for fundraising, development, and the preservation of Sagamore Hill National Historic Site; and

WHEREAS, the Service and the Association have cooperated since 1963 in matters affecting the preservation, development, and protection of Sagamore Hill National Historic Site; and

WHEREAS, the Theodore Roosevelt Association, chartered by Congress on May 31, 1920 (41 Stat. 691, as amended by 67 Stat. 27, 70 Stat. 60 and 76 Stat. 217), is a public corporation dedicated to preserving the ideals and memory of the twenty-sixth President of the United States with membership in all states of the Union; and

WHEREAS, both the Service and the Association have worked harmoniously over the many years in furtherance of their mutual and respective purposes for future generations of Americans; and

WHEREAS, it is the desire of the Service and the Association to reduce to writing the responsibilities, duties and privileges of each to the end that the cooperative and harmonious relationship shall continue; and

WHEREAS, the Cooperative Agreements between the Service and the Association, signed in December 26, 1984 and July 12, 1995, have now expires;

NOW, THEREFORE, in consideration of the foregoing and pursuant to the authority contained in Public Law 87-547 and 16 USC1, and in consideration herein expressed, the said parties have covenanted and agreed, and by these presents do covenant and agreed, and by these presents do covenant and agree to and with each other as follows:

ARTICLE I. The Association does agree for itself, its successors and assigns that consideration will be given to assisting the Service to protect, administer, and develop Sagamore Hill National Historic Site by Such means as the Association decides, including but not limited to:

a. Providing an annual donation for the use of the Sagamore Hill Committees of the Association, in their support of the site, and/or by soliciting support for the site from public and private sources. Such obligation, however, shall be understood not to bind the Association to expend an sum in excess of revenues received by it or designated by it for such purposes.

b. Assisting the Service in the acquisition of appropriate furnishings, museum objects, memorabilia, photographs, and related items for donation and/or purchase, and seeking to provide the resources for the purchase, restoration, maintenance, display, storage and professional research and documentation of same.

c. Assisting the Service by supporting the development of an educational program for the sites, which could include the preparation of school pre-visit kits, audiovisual materials, publications, and other materials, and sponsorship of lectures, walking tours, symposia, and other programs.

d. Will provide the Superintendent of Sagamore Hill with an annual balance of available funding from the Theodore Roosevelt endowment fund at the National Park Foundation to determine projected proposals for preservation and maintenance needs of the site.

e. Utilizing its status as a not-for-profit corporation to assist the Service as requested, whenever such legal status would facilitate site preservation, development, protection, and fundraising, as for example, in endorsing the support of the "Friends of Sagamore Hill" volunteer group in the effort to facilitate fundraising campaigns and to utilize these funds exclusively for the benefit of the Sagamore Hill National Historic Site, and in the acquisition of public or foundation grants or in the sponsorship of efforts to utilize publicly funded work-study or employment programs.

f. Assisting the Site to obtain specialized professional services when such services are not available within Site staff or when such assistance is not readily available from other Service offices. Such services might include architectural and engineering assistance, conservation assistance, writer/photographer/editorial assistance, education specialist assistance, research assistance, etc.

ARTICLE II. The Service agrees on behalf of the United States of America that:

a. It will protect, administer, and develop Sagamore Hill National Historic Site according to plans developed through a documented process of public participation, commensurate with available appropriated funds.

b. It will provide technical and professional staff to preserve, protect, maintain, and operate the Sagamore Hill National Historic Site in accordance with Statements for Management, General Management Plan and other approved operating plans, commensurate with available appropriated funds.

c. It will support the work of the Association at the Sagamore Hill National Historic Site by authorizing the use of facilities for the Association's annual meeting and dinner, without charge, at such times and such locations and upon such terms and conditions as determined appropriate, in writing, by both the Service and the Association.

d. It will authorize the use of meeting rooms and facilities at the Site to support the work of the Association through meetings of the Association's Executive Committee, Board of Trustees, Site subcommittees, and annual TR Public Speaking Contest, special programs and the like, without charge, at such times and such locations and under such terms and conditions as determined appropriate, in writing, by both the Service and the Association.

e. It will authorize the Association to store its stocks of sales publications, without charge, at the Sites as space is available at such times and such locations, and upon such terms and conditions as determined appropriate, in writing, by both the Service and the Association.

f. It will provide the Association, upon request, black and white copies of photographs in the Site's collections at cost for the reproduction of negatives and prints.

g. It will authorize the Association to store its holdings of archival materials, books, memorabilia, artifacts, and the like, without charge, at the Site at such times and such location and upon such terms and conditions as determined appropriate, in writing, by both the Service and the Association.

h. It will submit to the Association for review and concurrence, the annual Service funding proposal for the Theodore Roosevelt endowment fund at the National Park Foundation in accordance with the Act of July 25,1962.

ARTICLE III. The Association and the Service agree that:

a. During the performance of the Agreement, the participants agree to abide by the terms of Executive Order No. 11246, as amended by Executive Order No. 11375, on nondiscrimination and will not discriminate against any person because of race, color, religion, sex or national origin.

b. No member of or delegate to Congress, or resident Commissioner, shall be admitted to any share or part of this Agreement or to any benefit that may arise therefrom, but this provision shall not be construed to extend to this Agreement if made with a corporation for its general benefit.

c. This Agreement shall remain in full force and effect for a term of two (2) years from the date of execution hereof, unless sooner terminated as hereinafter provided.

d. This Agreement may be terminated by either party upon sixty (60) days prior written notice to either party, provided, however, upon such termination funds previously committed or activities previously authorized, in writing, by both the Service and the Association for any given project shall not be withheld and each such project shall be completed by the responsible party.

e. Nothing herein contained shall be construed as binding the Service to expend in any one fiscal year any sum in excess of appropriations made by Congress or administratively allocated for the purpose of this Agreement for the fiscal year, or to involve the Service in any contract or other obligation for the further expenditure of money in excess of such appropriation or allocations.

f. No transfer or assignment of this Agreement or of any part thereof or interest therein, directly or indirectly, voluntary or involuntary, shall be made unless such transfer or assignment is first approved by both parties hereto in writing.

g. The rights and benefits conferred by this Agreement shall be subject to the laws of the United States governing the National Park Service and the rules and regulations promulgated thereunder, whether now in force or hereafter enacted or promulgated, and nothing herein shall be construed as in any way impairing the general powers of supervision, regulation and control by the Service of property under its ownership or control.

h. For the purposes of this Agreement, written determinations and authorizations shall be executed for the Service by the Superintendent of the Sagamore Hill National Historic Site, and for the Association shall be by any of its duly authorized officers or Executive Director.

IN WITNESS WHEREOF, the Service and the Association have, on this day and year first written, caused these presents to be signed, sealed and delivered by their respective representatives thereunto duly authorized.

UNITED STATES OF AMERICA
DEPARTMENT OF THE INTERIOR
NATIONAL PARK SERVICE

WITNESSES:

By: Monica H. Boyd

By: Lowell M. Ang
Title: Superintendent
Date: 1/26/2001

THEODORE ROOSEVELT ASSOCIATION

By: Linda E. Milano
LINDA E. MILANO
ASSISTANT DIRECTOR
THEODORE ROOSEVELT ASSOCIATION

By: John A. Gable
Title: Executive Director
Date: January 12, 2001

Seal affixed, JAG

APPENDIX O

VISITATION STATISTICS, 1979-2004

Visitation statistics are often unreliable, particularly where the method of counting may have changed. As described in Chapter 4, visitors were counted inside the Theodore Roosevelt House until 1973. In 1974, the method was changed: now cars were counted as they left the parking lot and multiplied by the average number of occupants as judged by the counter. This created the appearance of a jump in visitation. Since at least 2001 (see Chapter 6), the number of tickets sold for house tours has been used in lieu of a direct count of visitors. This results in an extremely conservative visitor count which may have helped create the appearance of a decline in visitation. It is not known precisely when this method was adopted.

1963	42,722 (partial year)		1984	120,835
1964	82,222		1985	121,598
1965	98,256		1986	119,458
1966	110,361		1987	104,801
1967	111,844		1988	135,331
1968	123,687		1989	159,839
1969	104,266		1990	168,975
1970	121,198		1991	115,176
1971	129,735		1992	80,621
1972	122,438		1993	58,762 (partial year)
1973	132,438		1994	62,887
1974	126,182		1995	71,261
1975	65,018 (through 11.30)		1996	71,195
1976	(unavail.)		1997	96,590
1977	(unavail.)		1998	90,919
1978	(unavail.)		1999	67,193
1979	167,509		2000	53,182
1980	181,231		2001	45,176
1981	179,676		2002	42,526
1982	144,023		2003	42,396
1983	123,487		2004	41,082

Sources: 1963-1975: J. Brown, J. DeMarce, P. Steele, *Historic Resources Management Plan*, December 1975. For the years 1979-2004: website of the National Park Service's Public Use Statistics Office at http://www2.nature.nps.gov/stats/ (consulted February 2005). Some figures for the post-1979 years are also available in annual park reports: they generally, but not always, match those given here.

APPENDIX P

SUPERINTENDENTS OF SAGAMORE HILL

1963 -	Franklin Mullaly
1964 -	Newell Foster (New York City Group) John Townsley (New York City Group)
1967 -	Henry Schmidt (Fire Island NS and New York City NPS Group)
1970 -	Jerry Wagers (Fire Island NS and New York City NPS Group)
1974 -	William Henrickson (New York Group)
1977 -	Roy Beasley, Jr.
1980 -	Loretta Schmidt
1987 -	Diane Dayson
1990 -	Donald Weir (Acting) David Avrin (Acting)
1991 -	Vidal Martinez
2000 -	Gina Johnson (Acting) Mike Bilecki (Acting) Elizabeth Hoermann (Acting) Lorenza Fong
2003 -	Mike Bilecki (Acting) Gay Vietzke
2005 -	Greg Marshall