

PRESERVING DESIGN INTENT IN THE HISTORIC LANDSCAPE

by

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ABSTRACT

This thesis explores preservation policy for the designed historic landscape, one of many categories of landscapes regarded as cultural resources worthy of preservation efforts. The designed historic landscape is a work of art, created by a recognized master in a unique setting and time period. Its preservation depends on a clear understanding of that creator's intentions.

A model for developing preservation policy was created using information from the museum field, landscape architecture history and the preservation movement. Using a series of questions which define significance, establish authority, examine record-keeping procedures and specify use of the landscape, the model is a tool for writing preservation policy. Questions are used to provoke discussion and create understanding of the individual site being examined. The document produced in answering the questions considers preservation of design intent as the critical factor in management decisions.

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The model was applied to a case study as a test of its value. Strengths and weaknesses are examined which only application of the model would reveal. A mission statement, preservation philosophy, inventory of landscape features and evaluation form were produced for the case study. These tools were all created as a result of applying the model to a particular landscape. This exercise illustrated the need for a clear definition of institutional purpose, accurate record-keeping procedures and a common understanding of the designer's intentions in creating and preserving the landscape. This tool is readily adaptable to any designed landscape seeking guidance in the decision-making process which determines the honest preservation of a work of art.

We cannot freeze a landscape in time, but we can understand its creation and preserve its intent by informed and respectful decision-making.

CHAPTER 1

RESEARCH METHODOLOGY

Review of Literature

Only in the past fifteen years have preservationists expanded their focus from saving individual buildings to preserving as much of the surrounding environment as possible. Frederick Cawley observes that:

landscapes are now valued as legitimate cultural artifacts worthy of the same curatorial attention as the architecture they functionally support (Shopsin 1977, 27).

Initial efforts in landscape preservation concentrated on justification for saving what is never fixed in time (Kunst and O'Donnell 1981), defining a historic landscape (Melnick 1981, Keller and Keller 1989), and identifying different types of properties worthy of preservation (Fitch 1976, Jackson 1976, Sales 1985 and Streatfield 1969). With greater understanding and wider interests, preservationists needed to define terms that applied directly to the historic landscape (Kunst and O'Donnell 1981, O'Donnell 1987). Much

of the language was adapted from archeology and building preservation as it developed after the passage of the National Historic Preservation Act of 1966. In 1987, the Office of Technology Assessment of the 100th Congress published a background paper stating that:

implementation of Federal historic preservation laws with respect to historic landscapes lags far behind the effort expended on historic buildings and archeological sites (U.S Congress, iii).

The cited paper focused on the need for a national survey of historic landscapes and the development of a Center for Preservation Technology. Neither of these goals has been accomplished to date. That the Olmsted Heritage Landscapes Act of 1987 failed to pass Congress illustrates the need for better interpretation and management of our historic landscapes and more persistent efforts by landscape preservationists to educate the American people.

The January 1981 issue of Landscape Architecture defines eighteen different categories of historic landscapes and the types of treatments used to preserve them (Kunst and O'Donnell, 12). Each category contains properties with unique preservation issues related to that sites' origin. Kunst and O'Donnell defined preservation as:

a process of stabilizing, rebuilding, maintaining or improving the condition and specific qualities of an historic landscape so that the landscape is protected and the design intent fulfilled (1981, 55).

This thesis explores policy for one category, the designed historic landscape, focusing on the preservation and maintenance of design intent. The National Register Bulletin 18, How to Evaluate and Nominate Designed Historic Landscapes, defines this category as:

a landscape that has significance as a design or work of art; was consciously designed and laid out by a master gardener, landscape architect, architect, or horticulturist to a design principle, or an owner or other amateur using a recognized style or tradition; has a historical association with a significant person, trend, event, etc. in landscape gardening or landscape architecture; or a significant relationship to the theory or practice of landscape architecture (Keller and Keller 1989, 2).

Design intent, location, setting, materials, workmanship, feeling and association are the criteria used to define integrity. Patricia O'Donnell, chairperson of the Historic Preservation Committee of the American Society of Landscape Architects and editor of "The Preservationist's Glossary" describes the historic designed landscape as:

a landscape where designer, form, layout or other design elements are the primary reasons for significance (O'Donnell 1987, 98).

She continues in defining design intent as:

The creative objects of the landscape designer or landscape architect that were applied to the development of the landscape either fully or in part. Design intent can be determined from graphic and written documentation, preferably from primary sources, written and graphic records of the original designer or landscape architect (O'Donnell 1987, 98).

The maintenance of design intent requires consistent application of management concepts and policies which respect the landscape as the creation of a design genius, a cultural resource and a unique, dynamic work of art.

The need for closer examination of design intent can be seen by examining current preservation policies for historic sites. Colonial Williamsburg is one of America's greatest models of preservation, not only of the structures but also the landscapes associated with the buildings. As late as 1989:

No master plan is guiding this (landscape preservation) effort, but the determination of a few dedicated to the preservation of the past (Chappell 1989, 34).

This is a dangerous attitude which subjects the designed landscape to the personal tastes and bias of the current caretakers. John Sales, Garden Advisor to the National Trust for Places of Historic Interest or Natural Beauty in Great Britain, stressed the importance of policy in preservation when he said:

A garden is not an object, but a process. Restoration differs from conservation and upkeep only in degree and for both purposes a consistent policy and long term plan is required. These should be based on the full knowledge of the garden and those who made it (Sales 1985, 61).

Colonial Williamsburg is not an exception. The designed historic landscapes researched by this author had little more than a vague mission statement to guide the staff responsible for maintaining and interpreting the grounds. Rarely is design intent explored as the key issue upon which a preservation management plan is built. If not understood and respected by the decision-makers and caretakers, the original design intent is lost, historical significance threatened and the site becomes merely a reflection of its current caretakers tastes and opinions.

The exception is the work currently being done at Fairsted, the home and office of Frederick Law Olmsted and the Olmsted Brothers firm until 1980. Located in Brookline, Massachusetts, Fairsted is a National Historic Site which is preserved by the National Park Service "in order to interpret (it) for the benefit, inspiration, and education of present and future generations." (Berg 1988, 41) Fairsted is a designed historic landscape created by America's most recognized landscape architect. It is critical for the maturity of the landscape preservation movement that Fairsted be recognized and preserved based on

its significance as a work of art, created by a design master. Shary Page Berg, site manager for the Frederick Law Olmsted National Historic Site, wrote:

Design intent has served as the principal guide in determining the treatment of the Fairsted landscape. This approach recognizes the importance of the continuum of history. Maintenance practices play a key role in the overall success of landscape rehabilitation. The burden is on the maintenance staff to understand and respect the design intent of the overall landscape as well as the cultural needs of the individual plants (Berg 1988, 47-48).

At Fairsted, the National Park Service is researching and maintaining the landscape as well as all historical documentation of the Olmsted Brothers firm. Documents tracing the history of the firm as well as the evolution of the landscape are being cataloged and conserved for historical and educational purposes.

Drawings, plans, journals, plant orders and invoices, photographs, surveys and client communications are primary sources of information which researchers need in order to determine design intent. Any writings by the landscape architect should be collected and preserved as important evidence of the creator's thought process and creative inspirations. The collection and preservation of documents relating to the history of a property, owner or designer requires an understanding of current curatorial practices in areas such as paper conservation, archival

storage, and cataloging of materials. Collection management in museums is governed by policies which articulate the purpose of the collection, define who is responsible for its care and describe what procedures should be used to acquire and dispose of museum artifacts (Malaro 1984). Daniel Porter wrote:

Today's well-managed collection is governed by three fundamental documents - a collections management policy, a collections management manual, and a collections plan... (which) guarantee high uniform standards of collections administration over a long period of time despite changes in personnel (AASLH 1985, 1).

These kinds of Board-approved policies create guidelines for new staff, as well as protecting those charged with the fiduciary responsibility of managing a public trust. A policy directs purpose, objectives and responsibilities. A manual sets directives, guidelines and formats, while a plan is an inventory and analysis of the collection (Porter 1985). Most museums concentrate their initial efforts on drafting a collections management policy which the Board of Trustees approves and accepts as the "constitution" of the institution. Issues of legal responsibility, acquisitions and removals, loan policies and access to the collection are debated and decided by an appointed committee of staff and Board members (Malaro 1984). Each institution must develop its own policy to accommodate its collection and reflect the mission while maintaining professional museum standards.

These principles have been utilized by zoos and botanic gardens, which maintain living collections of animals and plants, and exhibit them for the education and enjoyment of the public. Collection management concepts can be applied to the historic landscape if one considers the plants and architectural elements of a garden as objects collected and conserved for the benefit of the public. The real difference lies in the importance of the artistic arrangement of the objects, many of which change over time. The growth of plants and subsequent changes in the integral relationships between them are the truly challenging aspects of designed landscape preservation.

The discussion of collections management policies illustrates one area the author explored in researching policy that might be used in formulating a model for design intent preservation. Combining elements gleaned from the curatorial principles used in museums, preservation planning philosophy, historic landscape reports used by landscape architects and personal experience as the primary caretaker of a designed historic landscape, a model for preserving design intent is presented in chapter two. Application of the model to a case study, to test its value, is presented in chapter three. Chapter four reviews the strengths and weaknesses of the model and its application.

Selection of Case Study

The development of management policies for the designed historic landscape did not evolve in a vacuum. The author chose one specific landscape to which application of the developed model could serve as a test run for the policy. The site chosen is called "Naumkeag." It is a house museum and designed historic landscape, owned and operated by The Trustees of Reservations, and located in Stockbridge, Massachusetts. Naumkeag embodies a designed historic landscape in that it was the work of two recognized landscape architects, Nathan Barrett (1845-1919) and Fletcher Steele (1885-1971) and architect Stanford White (1854-1906), it has been recognized as one the most intact and significant of Fletcher Steele's designs, it is an outstanding example of the "Cottage Estate" style of living in early twentieth-century America and it has significance to the local community of Stockbridge, Massachusetts. Naumkeag was built in 1885-6 as a summer home by Joseph Hodges Choate (1832-1917), a lawyer of great repute who served as Ambassador to Great Britain during the McKinley administration.

Considered "an original and most appealing unity," Naumkeag is one of "the few gardens in America to have lasted so long or survived as well." (Fitch and Rockwell 1956, 76) Naumkeag, the house and its forty-six-acre landscape, were added to the National Register of Historic Places in August of 1975.

With the recent publication of a biography of Fletcher Steele (Karson 1989) and increasing attention to the importance and fragility of the landscape at Naumkeag, The Trustees of Reservations accepted the author's proposal to examine their landscape as a case study for investigating design intent. Naumkeag is a good example because the staff is currently struggling with the very issues of intent and use. Furthermore, designer Fletcher Steele and owner Miss Mabel Choate left a rich collection of historical records which enable the researcher and staff to thoroughly examine and understand their intentions for the site. The author first met with the staff at Naumkeag in January of 1989. Davis Cherington, Deputy Director of The Trustees of Reservations, granted the author approval to pursue the research. Obviously, that body which holds fiduciary responsibility needed to be informed of and give permission for actions taken that might affect their properties or staff.

Procedures and Justification

The author conducted four site visits to Naumkeag. Research concentrated on the landscape and its evolution from its inception in 1885 to its current status in 1990. Documentation for the period of 1926 to 1958 was examined in depth, since this is considered the time frame which the donor, Miss Mabel Choate, sought to preserve when she bequeathed the property to The Trustees of Reservation in 1958. Using primary documents, such as journals, letters, drawings, plans, photographs and the writings of both Miss Mabel Choate and Fletcher Steele, the author sought to establish a clear view of the design intention for the landscape at Naumkeag. An examination of the extensive libraries of both Steele and Choate revealed common threads of interest and shared passions.

The primary issues the author addressed were: to establish design intent for the landscape at Naumkeag, to develop a model for managing design intent (and changes to it) over time and to encourage the staff of The Trustees of Reservations to preserve all the essential primary documentation used to establish the creator's intent. Since none existed, a mission statement was drafted by the House Administrator, Landscape Superintendent, Western Regional Supervisor and the author. Using the proposed mission

statement as the opening declaration of significance, the author developed a model which leads the reader through a series of questions. The answers are to be used to formulate a policy that determines design intent, establishes lines of authority and accountability, requires accurate record keeping and archival preservation, establishes guidelines for use of the site and discusses the role and resources of the institution in preserving the designed historic landscape as a work of art.

CHAPTER 2

A MODEL FOR DESIGN INTENT PRESERVATION

The designed historic landscape is preserved because it is recognized as fine art, a unique creation considered a cultural resource. The following model for the Designed Historic Landscape Management Policy is intended to be the institution's written understanding of the landscape as a cultural resource and addresses how to maintain the integrity of the design. Answers to a series of questions outlined below will yield a policy unique to the institution which creates it. These questions address historical significance, define design intent and establish management guidelines. The policy model considers preservation of design intent the critical factor in management decisions. Because every maintenance decision affects the appearance and ultimately the integrity of a designed historic landscape, this model serves to articulate an institutional philosophy which respects the design intent and creates a means of preserving the historic integrity of the site.

Staff using the model may not find every question asked in the model to be applicable to their landscape. The point is to encourage discussion and offer considerations unique to design intent which might be overlooked in general preservation planning. Starting and ending with the institutions's mission, the model continues to focus on what the designer's intentions were and how they can be preserved by daily maintenance decisions. Each section is followed by a brief explanatory note to help the reader understand the thought process used in developing the model.

Designed Historic Landscape Management Policy

1. STATEMENT OF SIGNIFICANCE

a. Institutional Mission Statement:

(1) Why does the institution exist and what is its purpose?

A mission statement is a broad but concise declaration which is approved by the governing board to articulate why the institution exists. It also gives the reader a:

perspective on its physical and institutional attributes which make that organization unique (McHugh 1980, 23).

This opening statement introduces the organization and anchors the policy to the governing philosophy of the institution which owns and/ or manages the landscape.

b. Identification of the Landscape as an Integral Component of the Institution:

(1) Is the landscape significant to the institution's mission? Is it a setting for a historic house, the creation of a recognized master or important historical figure, a work of art or an example from a significant period in history?

An institution will commit resources to preserving a landscape when it can be demonstrated that the landscape is a vital component of its mission. This may seem obvious but it is essential to document what role the landscape serves in meeting the goals of the organization. A sentence which connects the mission statement and the landscape is all that is required here.

c. Determine and Document the Design Intent of the Landscape:

(1) Who was the primary creator: the owner, a landscape architect, horticulturist, master gardener or architect? Was the design now being preserved the product of more than one person? Was it created all at once or did it evolve over a period of years?

(2) Is the designer significant beyond this creation? What is known about the person or persons? Did the person publish or lecture? Can their design concepts and philosophies be documented? What was their reputation, as artist, plantsman or designer?

(3) What remains of the design and what visual evidence can be recorded now? Are elements of the design missing? How has the adjoining, "borrowed" landscape changed? Can and should missing elements be replaced? Can the institution maintain them if they are restored? (See Section 4-c, The Institution and its Resources, page 24)

(4) What documents relating to the planning, planting and history of the landscape can be found and where are they? (See section 3-b, Preserving the Archival Records of the Landscape, page 21)

(5) How does the existing landscape design fit into historical context of the geographical site, of landscape architecture as a fine art and of American history during that time period? Was a design concept executed for the first time in this landscape?

Section 1-c examines the critical questions of design intent. By leading the staff through this thought

process, the model is designed to provoke discussion, encourage research and promote a common understanding of the importance of design intent in the daily decisions made by maintenance and management staff. Use of a facilitator in these discussions may prove to be helpful. More than a history lesson, this section explores the evolution of a dynamic ecosystem, considering the individual components, the relationship of the pieces to the whole work and the conceptual framework the designer surveyed in executing the work of art. Once an understanding of the designer's intention is reached, the next step is to decide how best to honor that design intent in management practices.

2. ESTABLISH LINES OF AUTHORITY

a. Board of Trustees:

(1) Who are the indemnified and responsible members of the board and do they honor their fiduciary responsibility?

(2) At what level are the Trustees involved? Are they fund-raisers, docents, committee members or advisors?

Trustees have legal responsibilities to the institution they serve. By identifying the Trustees, their positions in the community and their individual resources, staff members have a clearer understanding of the authority

and power held by the Board of Trustees.

b. Committees:

(1) Does the institution rely on committees to make decisions, advise staff and involve the community? Do professionals volunteer for the institution? Do committees and their members serve indefinitely? Are they board-approved to make decisions?

c. Staff:

Who is the primary caretaker of the landscape? Who makes the final decisions on any changes in the landscape? How is the staff organized, and who answers to whom?

Section two reviews the structure and hierarchy of the organization in order to identify responsible staff and establish accountability. A review of the organizational chart is helpful at this point. The Board may be actively involved in daily affairs, either because Trustees are active volunteers or there is little or no professional staff. More often, the Board relies on paid professional staff to execute decisions made in monthly or quarterly meetings. Accountability is the issue here. Those individuals or committees making the decisions must understand the critical role they play in the preservation

of the site. Indecision can spell disaster for a designed historic landscape, because it will change whether humans intervene or not.

3. RECORD KEEPING AND DOCUMENTATION

a. Define the Need for and Means of Keeping Accurate Records:

(1) Who is responsible for which aspect of record keeping? Will the daily records of additions and deletions be recorded by the primary caretaker? Will the historical records be kept by an archivist, librarian or curator?

(2) What records are required? Will all plants added to or removed from the landscape be recorded? What replacements will be allowed? Will gifts be accepted and under what conditions? Is a collections management policy needed or available for adaption to the landscape?

(3) When will these records be made: daily, weekly, monthly? Are periodic evaluations of plants, architectural features or statuary made? If so, are the evaluations used?

(4) Why are the records important? Are budget forecasts made based on last year's records? Is funding determined by adherence to professional museum standards and accurate data on visitation,

gifts and volunteer involvement?

Accurate record keeping is an essential but time-consuming task for any organization. Deciding who keeps what records relates to accountability. Information is less likely to be lost when an individual is responsible to manage it. Some institutions will have collections management policies approved by their boards and carried out by curators or registrars. Although chronically understaffed and volunteer-dependent, struggling organizations cannot ignore this critical need. Even daily logs will meet minimum needs in recording the evolution of the changing landscape.

Individual sites must determine who is best suited to keep records. The primary caretaker, be it a gardener, horticulturist or superintendent, should keep daily logs of activities planned and accomplished in the landscape. Essential landscape design elements, such as large trees, can be lost in severe storms. Records of such events become part of the interpreted history of the landscape. When an architectural feature fails, such as a railing or fountain, the changes made to correct the failure must be recorded. Dated photographs of dead trees or damaged statues give researchers graphic evidence of and reasons for changes made to the design. Responsible, consistent record-keeping is

critical for even the smallest house museum with an important landscape.

All primary records should be kept under stable environmental conditions, housed in acid-free containers and ideally stored in fire-proof cabinets. Every museum needs some sort of disaster plan that is known and understood by the staff.

b. Preserving the Archival Records of the Landscape:

(1) What records does the institution own which relate to the site? Are there drawings, photographs, journals, planting plans, invoices for materials or correspondence?

(2) Where are the records kept? Are they stored under archival conditions? Do copies of key documents exist and are they kept in a separate location? If the institution does not own documentation, does it exist? Where is it located?

(3) Does the institution allow scholarly research? Do they limit access to fragile, irreplaceable documents? Is there a conservation policy? Are researchers charged for use of the collection and does that money go to support the collection?

The heart of any research into a landscape's significance lies in the historical documentation of the site. Preservation of primary information resources is as essential as maintaining the landscape itself. Locating, cataloging, copying and carefully storing historic documents requires an investment of time, labor and money for the institution. Consider those records now being made (the daily logs of the landscape) as part of the historic documentation, since years from now, they will tell the continuing story of managed change over time in that landscape.

4. USE OF THE DESIGNED HISTORIC LANDSCAPE

a. Establish Guidelines for Public Access to the Site:

(1) Is the property available to rent for commercial uses, such as fashion photography, weddings or private parties? What is the charge? Is there a contract? Does this use fit into the mission of the institution? Is this a much needed form of revenue? Is the landscape being compromised to raise money?

(2) Are there fragile areas which cannot sustain heavy visitor traffic? What is the maximum number of visitors the site can accommodate without damaging the landscape?

(2) How do the public amenities (rest rooms, parking, refreshments) fit unobtrusively into the landscape? Can visitors and staff with handicaps be accommodated? Are there features which pose security or liability risks? What kind of signage directs visitors without destroying the ambiance of the historic setting?

(4) What are the visitation hours during the season? What is the charge for individuals, groups, senior citizens and students? Are tours offered? Can the site handle bus traffic?

Public use of the historic landscape relates back to the opening statement. What is the institution's mission and what role does the landscape play in meeting those goals? Often, the designed historic landscape was once a private estate, a family home never intended to accommodate bus tours or huge crowds. Preserving design intent while creating a parking lot, wheelchair ramp, rest rooms and gift shop requires an intimate familiarity with the landscape and its intended role in serving the public. Sometimes, limiting access to small groups, locating parking lots off-site and using shuttles or having a visitor center away from the interpreted landscape can soften the effect of public use of a once-private landscape. Each institution must determine how much is too much, where to draw the line in

accepting visitors and compromising the integrity of the landscape. But foremost, the staff must reconcile what the design intent was before making these difficult decisions.

b. Educational Programs:

(1) Is education part of the institution's mission? Is the landscape used as a laboratory for instruction? Is the landscape considered a collection and interpreted to the visitor?

(2) Is the archival collection relating to the landscape's evolution and development a valuable educational resource? Does the institution collect materials related to the designer or landscape history?

Beyond accommodating tours, consider the educational mission of the institution. If the designer of the site is the reason for its historical significance, will the institution act as a repository for that person's records? Does staff research and teach landscape history or design? Are the grounds used to demonstrate principles? Consider the expense of educational programs. Establish priorities for funding by using the institutional mission statement as the guide for allocating resources.

c. The Institution and its Resources:

(1) Can the organization dedicate sufficient

resources to maintain the design intent of the landscape? What is the balance between preserving the landscape and using it to generate revenue?

(2) What are staffing levels at the institution? Is there a dedicated and committed volunteer force? Will compromises be made in design intent to lower maintenance expenses? Can the landscape still be considered accurately preserved if compromises are made?

The organization must achieve balance between preservation, historical accuracy and adequate means to sustain these efforts. Landscapes require consistent management, yet are often the first area to endure budget cuts during a fiscal crisis. Deferred maintenance spells disaster for the proportional relationships at work in a designed historic landscape. Most not-for-profit organizations struggle to maintain their collections, which by their age and nature, require expensive care. Finding dedicated funding or creating endowments for the landscape is the most obvious solution to budgetary restraints.

Another issue facing institutions with beautiful landscapes is establishing policy for commercial use of the property. This is an attractive form of revenue for a struggling not-for-profit organization, but several

considerations must be addressed. Will this source of revenue generation threaten the Internal Revenue Service not-for-profit 501(c)3 tax exempt status of the institution? Does commercial use fit into the stated educational or public service mission of the institution? Will other not-for-profit organizations pay the same fee as commercial or private users? How can the fragile landscape be protected from irresponsible or insensitive users?

This model is a vehicle for staff to compile information and formulate policy. The greatest role this model can serve is to stimulate discussion which leads to a consensus of purpose. When the trustees and staff thoroughly understand design intent, they can make intelligent decisions for preserving it. The decision-makers, be it trustee, director or gardener, need to see their role in preserving the elements which together form a unique and historic work of art.

CHAPTER 3

APPLICATION OF MODEL TO THE CASE STUDY

The model, "Designed Historic Landscape Management Policy," presented in chapter two was applied to a designed historic landscape so the model could be evaluated. Naumkeag, a designed historic landscape, is the case study. The second section of this chapter applies the model to Naumkeag by asking, and answering the questions posed in the model. The third section offers suggestions on how the model might be used by owners of designed historic landscapes. The appendices contain an inventory of the gardens at Naumkeag and a sample evaluation form for recording the condition of those gardens. These three documents, the model, the application and the sample evaluation form, are tools to be used by caretakers in understanding, documenting and maintaining design intent in their preserved landscapes.

Description of Case Study

Joseph Choate had brought his family to the Berkshires for several summers before the forty-six acres was purchased in 1885. Using the Indian word for his birthplace in Salem, Choate named his summer residence Naumkeag, meaning "haven of peace." The hillside acreage had an imposing view of the Berkshire mountains and was dominated by an aged white oak, beneath which the Choates would often picnic (Karson 1989).

In 1885, Choate asked his friend Charles McKim to design his summer home. McKim assigned the commission to his young associate Stanford White when his own wedding plans preoccupied him (Choate 1956). White used ideas collected from extensive European travels in designing the twenty-six room, Norman and Shingle style mansion.

White worked with Nathan Barrett in siting the mansion on the property. Barrett was a Boston-based landscape architect known as a city planner and one of the founding members of the American Society of Landscape Architects (Newton 1971). He sited the house atop the steeply sloping hillside, preserving the Choate's favored oak tree and concentrating all services to the eastern, streetside of the mansion. This gave the house a western

exposure and left the mountain view intact. To the north of the mansion, upper and lower terraced, formal gardens were created, separated by an allee of arborvitae. The service drive, greenhouse and kitchen garden were downhill, below the level of the house and formal gardens (Brooks 1981). Barrett gently terraced the south lawn beneath the oak, where the family played tennis and other outdoor sports. The property was completed in 1886, reflecting the distinctive style of the great cottage estates popular in the late Victorian era referred to as America's Gilded Age.

Mrs. Caroline Sterling Choate, a painter by training and a horticulturist, instructed her children in the fine arts. It was she who admired an allee of clipped lindens in Germany and added this feature to her landscape in the early 1890s. There is no evidence that Barrett was invited back to Naumkeag to make changes once his original designs were executed. Following the death of Joseph Choate in 1917, Mrs. Choate hired New York landscape architect Marion Cruger Coffin (1876-1957) to design new planting schemes for the upper formal gardens. The last known communication with Coffin, found in the Mission House files, is dated 1921, and includes Mabel Choate in addressing the invoice. The landscape remained true to Barrett's intentions until after Caroline Choate's death in 1929, the only changes made were in the planting schemes of the perennial garden and a re-

arrangement of the service access near the house. It was Mabel Choate's meeting of Fletcher Steele in 1926 that began the thirty year collaboration which would compose the landscape masterpiece at Naumkeag.

Choate and Steele began their work with the modification of the service access to the northeast of the house. Steele would work with Choate to create the following gardens and views at Naumkeag: the Afternoon Garden (1926-1929), the West Terrace (1931-1936) including the Perugino View and the Great Seat, the regrading and sculpting of the South Lawn (1933-1940), the Chinese Temple and Garden (1936-7), the Blue Steps (1938-39), the Rose Garden (1953-5), the Peony Terrace (1954) and the completion of the Chinese Garden enclosure with the construction of the Moon Gate in 1955.

Initially, Steele did not tamper with Barrett's work to the north of the house, except his revisions to the service access. He agreed with Choate,

...that the bones of what had been first done were good and should not only be preserved where possible but that the old spirit should be followed in all that was to come (Steele 1947, 1).

In 1935, Choate traveled to Japan, Korea and China, where she purchased an extensive collection of oriental artifacts, necessitating a place for her new treasures. That place,

the Chinese Garden, was built upon the formal upper terrace garden designed by Barrett. Having disrupted the balance of the two formal spaces, and wishing to lower maintenance requirements for the landscape, Steele simplified the lower terrace, replacing the annuals with evergreens and dwarf conifers. The perennial flowers from the Coffin planting in the upper terrace were used to create a cutting garden next to the greenhouse on the lower southwestern lawn, which later provoked the design of Fletcher Steele's signature work at Naumkeag, the Blue Steps.

Perhaps because she left no direct heirs, or because her passions had been spent on her home and gardens, Miss Choate believed that Naumkeag could be preserved to tell future generations of a by-gone era. Her confidence in The Trustees of Reservations (then called The Trustees of Public Reservations) had been established in her 1948 donation of the Mission House in Stockbridge to the conservation group. Miss Choate hired Steele to supervise the siting, design and construction of the colonial garden for the Mission House after she rescued the 1739 landmark and relocated it to Stockbridge's Main Street in 1926. Steele was a preservationist who had been involved with The Trustees of Reservations and The Landmark Society of Western New York, serving on their Boards and promoting preservation principles. He encouraged Miss Choate's involvement and

interest in preservation.

On May 13, 1958, The Trustees of Reservations accepted the forty-six acres of land, called Naumkeag, as offered by Miss Mabel Choate. They took possession of the property in January of 1959, following Miss Choate's death. The terms and conditions state that the property was:

...to be operated and maintained for the benefit of the public as a country house museum (Boston Globe 1959).

Miss Choate left an endowment to be used for the upkeep of the property, clearly stating in her will that:

I express the desire that if the main house at Naumkeag shall be damaged by fire or other agency (or be damaged to such an extent that restoration would be undesirable, either because of its excessive cost or because the property would no longer be an authentic representation of the times and manner of living it now represents) said THE TRUSTEES OF PUBLIC RESERVATIONS shall give careful consideration to the practicability and desirability of continuing to maintain the gardens at Naumkeag and to make them available for the use and pleasure of the public (Choate, Last Will and Testament, 3).

Such evidence of the donor's intention is critical to document, understand and execute. Therefore, the author sought all records relating to the owner's intentions, thoughts, feelings and motives in developing the property she later sought to preserve. As more documents were studied, and a greater familiarity with the property evolved, the primary focus became the relationship between Miss Choate and Fletcher Steele. It was Steele who brought

life to Miss Choate's vision for the landscape. During one of his frequent lectures, Steele articulated his feelings about the relationship of the landscape architect and the client when he said:

...a true artist strives to bring to other people's lives a suitable inspiration for their contentment, even he hopes their happiness. To reach this sensitive achievement, he must first study the personality of the people for whom the place is to be created...He wanders into the house to see what kinds of books she reads, what kind of furniture and bric-a-brac she gathers about her. He gets her talking about her travels and the places she likes the best and the ones she does not like. He probes to discover, not what she has, but what she dreams of having: not what she does but what she would like to do (Karson 1989, 108).

Miss Choate and Fletcher Steele created this work of art together because they shared a common vision of beauty and art.

Application of Model to Naumkeag

1. STATEMENT OF SIGNIFICANCE

a. Institutional Mission Statement:

(1) Why does the institution exist and what is its purpose?

Proposed Mission Statement for Naumkeag

Naumkeag is a historic house museum surrounded by significant gardens. It is owned by The Trustees of

Reservations, a private, not-for-profit conservation group in Massachusetts which is dedicated to preserving properties of exceptional scenic, historic and ecological value throughout the Commonwealth. Naumkeag is operated and maintained for the benefit of the public as a country house museum at the bequest of the donor, Miss Mabel Choate.

The proposed mission statement for Naumkeag uses the words of Miss Choate and The Trustees of Reservations' promotional literature to broadly state Naumkeag's purpose. This brief statement leads the reader into the policy by establishing the connection between the property and the institution which is responsible for its preservation.

**b. Identification of the Landscape as an
Integral Component of the Institution:**

(1) Is the landscape significant to the institutional mission? Is it a setting for a historic house, the creation of a recognized master or important historical figure, a work of art or an example from a significant period?

The Trustees of Reservations are committed to preserving exceptional historical sites in Massachusetts. Naumkeag is a forty-six acre property which has been listed on the National Register of Historic Places since 1975.

That nomination includes descriptions of the gardens created by Nathan Barrett and Fletcher Steele as components of the property's significance. It was the home of a famous statesman and lawyer, it was the creation of recognized masters, it is a work of art and it is an intact example of the "Cottage Estate" era in the Gilded Age of American history. Documents clearly reveal what Miss Choate and Fletcher Steele thought about their work. Miss Choate considered the landscape of Naumkeag to be a work of art, and Steele the artist. In a letter to Steele, Miss Choate wrote:

So, in my mind, Naumkeag is now a work of art. Thanks to you. I am more interested in it and excited about it all the time...for you know, I have always wanted to make it a complete whole, like a picture in its frame (Choate 1950, 3).

Robin Karson, in her thorough examination of Steele's life and work, said:

His (Steele's) commitment to the belief that gardenmaking is art as surely as painting or music informed every design decision he made (Karson 1989, xix).

Asked by writer F.F. Rockwell for comments on his designs in 1955, Steele said:

I should have called myself a "landscape sculptor" as that is what I was and am. But I did not realize it at the time (Steele 1955, 2).

c. Determine and Document the Design Intent of the Landscape:

(1) Who was the primary creator: the owner, a landscape architect, horticulturist, master gardener or architect? Was the design now being preserved the product of more than one person? Was it created all at once or did it evolve over a period of years?

Nathan Barrett is credited with the original layout of the landscape, yet it was Fletcher Steele who created the complex arrangements of gardens which Miss Choate sought to preserve. Therefore, the primary research focus on design intent is of Steele's work, rather than Barrett's. The role played by Miss Choate is important, not only because her resources made the gardens possible, but she also directly influenced design decisions. According to Karson:

the deliberations between patron and artist almost always focused on questions of design. If she could be convinced of a new proposal's artistic merit, the money became available (1989, 134).

At Naumkeag, the landscape developed as gardens were designed, outdoor room by outdoor room, until the whole picture emerged in the 1950s. Each garden was designed in response to a need or longing expressed by Miss Choate and satisfied by Steele. This sentiment was expressed in a letter written by Steele in 1946 when he said:

To me its (Naumkeag's) real interest lies in the fact that it shows a place which was developed, one thing from another, with only a vague overall

scheme in mind in the first place. Growth of this sort has a sort of life of its own that never comes when everything is planned in the beginning (Karson 1989, 119).

(2) Is the designer significant beyond this creation? What is known about that person or persons? Did that person publish or lecture? Can their design concepts and philosophies be documented? What was their reputation, as artist, plantsman or designer?

Fletcher Steele (1885-1971) practiced landscape architecture as a fine art for almost sixty years. He wrote extensively, publishing two books and numerous articles for popular magazines such as House and Garden, Horticulture, Landscape Architecture and the Garden Club of America's Bulletin. He supported himself during the lean war years with his writing and popular garden club lectures. His influence on the field of landscape architecture has only recently been recognized. According to Jory Johnson, ASLA and contributing editor of Landscape Architecture:

The first significant influence of 20th-century art and architecture on American gardens can be found in the work Fletcher Steele, an admirer of French Art Deco garden experiment of the 1920's (Tishler 1989, 139).

Steele trained in Harvard's first graduate class offered in landscape architecture, one of only two in the

country in the early 1900s. Olmsted associate Warren Manning convinced Steele to be his apprentice, then encouraged his establishment in private practice three years later. Steele never returned to Harvard to complete his degree. Most of Steele's six hundred commissions were for private properties owned by wealthy socialites. A majority of his finest designs were created over long periods of time with older women with whom he shared a variety of interests and friendships. Steele's attitude towards his relationships with clients and his work can best be described by Steele himself:

The work of the landscape architect is to balance three tensions - the pull of the land, the pull of the client and the pull of the designer himself, whose job it is to make a pattern of the three (Steele 1947, 69).

Steele disdained public works, once announcing at an ASLA meeting he would rather starve than design public works (Beck 1980). Besides his lectures and publications, Steele supported himself with retainers provided by his wealthiest clients to make regular visits and recommendations on their gardens and plantings. He was witty, charming, often acerbic and a popular guest in the homes of his clients. Choate was not the only life-long friendship Steele maintained with a client. He often introduced his clients to each other, knowing their common interests would create an immediate bond. Steele's

biographer, Robin Karson, wrote:

For sixty years Fletcher Steele practiced landscape architecture as a fine art. Steele's gardens reflect a deep, continuing interest in experiment rather than adherence to a specific style. Along with his writings, they constitute a link, arguably the link, between nineteenth-century Beaux Arts formalism and modern landscape design. (Karson 1989, xix).

Steele considered himself an artist, while his contemporaries and clients also recognized his skills as a plantsman. His work is compared with that of Beatrix Farrand, Warren Manning, the Olmsted Brothers, Ellen Shipman and Jens Jensen as highlights of early twentieth-century country estate design in America (Tishler 1989).

(3) What remains of the design and what visual evidence can be recorded now? Are elements essential to the design missing? Can they be replaced?

Naumkeag is a twentieth-century creation which has not suffered the decay and deterioration older landscapes have experienced. Since Miss Choate's death in 1958, The Trustees of Reservations have made exceptional efforts to preserve the essence of the landscape given a dramatic change in the maintenance budget from Miss Choate's days. Comparing the current landscape condition with maps, plans and photographs collected over the last thirty years, the essential design elements are intact at Naumkeag. Missing

are the rich details supplied by Miss Choate's constant attention to her gardens. Institutional management cannot realistically keep pace with the money and effort expended by a wealthy private owner. Since Naumkeag has opened for public visitation, theft and vandalism have forced the removal of irreplaceable items from high risk locations in the garden. The greenhouses were removed by The Trustees of Reservations in the mid-1970s when their deteriorated condition posed a safety and liability concern. The foundations and potting shed remain as a symbol of grander times on the estate. The emphasis remains on preserving what is there now.

As Naumkeag ages, efforts have been directed to replace, repair and preserve those architectural features and plantings which have been identified as key design features. Examples of those elements include the great white oak, which is an irreplaceable component in the design of the South Lawn and the history of the site's selection by the Choates, as well as the birch grove surrounding the Blue Steps. Exceptional efforts have been made to replace the ten locust trees in the South lawn with the same variety planted by Steele. The form, rather than the variety, was of greatest importance to Steele, who wanted the top-grafted globe locusts (identified as Robinia pseudoacacia 'Umbraculifera'):

like glorified lollipops on sticks (to cast shadows across the modelled earth, marking the minor changes which would otherwise flatten in the harsh light (Steele 1947, 8).

These trees will be replaced in the Spring of 1990, thanks to a generous contribution from the Berkshire Garden Club. Recent restoration efforts include thinning of the trees in the Linden Woods to allow greater light penetration to the Linden Walk, re-setting of the stone walls in the Peony Garden and extensive pruning of overgrown shrubbery throughout the property.

(4) What documents relating to the planning, planting and history of the landscape can be found and where are they?

Fletcher Steele was an idiosyncratic organizer who religiously recorded, photographed and filed his work. The contents of his office were donated to the American Society of Landscape Architects at Steele's bequest. His library, photographs and filing system are now at the F. Franklin Moon Library, College of Environmental Science and Forestry, State University of New York at Syracuse. A collection of correspondence, paper files and articles for publication is in the Manuscript Division of Library of Congress in Washington, while small reserves separated from the bulk of the collection remain in Rochester, New York (Steele's home town) at the University of Rochester and the Rochester

Historical Society. Naumkeag is fortunate to have an extensive collection of maps, drawings, photographs and correspondence between Miss Choate and Steele which are kept at the Western Regional Office of The Trustees of Reservations at the Mission House in Stockbridge. This area is covered more thoroughly later in section 3-b, page 57, "Preserving the Archival Records of the Landscape."

In 1981, graduate student Robert Brooks, of the University of Massachusetts at Amherst, prepared a preservation plan for Naumkeag which included a detailed map of the property, redrawn from a 1937 survey. In 1987, Yankee Intern Deborah Howe prepared a drawing of the property to be included in the guide to Naumkeag's gardens she developed as a summer project. The work of these students builds upon the on-going research conducted by staff of The Trustees of Reservations. Robin Karson's book on Steele gives a thorough treatment of Naumkeag, which can be further supplemented by the irreplaceable records in the files at the Mission House. Naumkeag is fortunate to have such a rich collection of documents to study.

(5) How does the existing landscape design fit historical context: of the geographical site, of landscape architecture as a fine art and of

American history during that time period? Was a design concept executed for the first time in this landscape?

Naumkeag was developed during what landscape architecture historian Norman Newton called the "Country Place Era," a four decade period of remarkable economic growth that began in the 1880s and ended with the 1929 Stock Market Crash on Wall Street (1971). The newly rich American Industrialists displayed their wealth by building lavish homes on large tracts of land. Fitch said: "the pleasure garden is, by definition, a product of economic abundance." (1956, p. 20) During this time, the young profession of landscape architecture earned its place as a unique design field and achieved status as a fine art.

Stockbridge was one of the favored "cottage resorts" of the rich, with the mountains as a natural amenity and rail service from the major cities. As in Newport, Rhode Island, or Saratoga Springs, New York, these idyllic countryside towns became a magnet for the successful, moneyed class wishing to escape the polluted urban centers. Kirkland implied that this wealthy, leisure class compensated for the absence of nobility or royalty in America by their conspicuous displays of wealth (Kirkland 1956). The Gilded Age in American history will never be

repeated, and the remnants of this lifestyle should be preserved.

How did Steele's work at Naumkeag relate to the field of landscape architecture during the early twentieth century? Comparing Steele with his contemporaries, Coffin, Jensen, the Olmsted Brothers and Farrand, does give a sense of perspective to Steele's work. But an understanding of context requires looking back further to the beginnings of an American style of garden design.

The European movement towards restoration of formal principles of design in the landscape was recognized and promoted by young artists and architects returning from Ecoles des Beaux Arts at the end of the nineteenth century (Teutonico 1983). Balance, symmetry and spatial hierarchies in architecture were transferred directly to the garden and landscape (Tishler 1989). Etcher, painter, architect, and landscape architect Charles A. Platt (1861-1933) gave credence to this ephemeral art form with the publication of his 1894 book Italian Gardens, the "first illustrated book in English on Italian Renaissance gardens." (Morgan 1985) Platt introduced the European notion of designing the house and garden as a whole - a "series of indoor and outdoor rooms" to American architecture and landscape architecture (Tishler 1989). The outdoor room seen by Choate in California in the mid-1920s found expression as the

Afternoon Garden at Naumkeag, thanks to Steele. Platt also encouraged the talents of Ellen Biddle Shipman, a neighbor in the artist's colony started by Augustus St. Gaudens in Cornish, N.H. Shipman (1870-1950) would establish her reputation as a superb plantswoman, producing beautiful plantings for Platt's architectural renderings. She, Beatrix Farrand and Marion Coffin were among only a handful of women practicing in America during the early days of landscape architecture and the twentieth century. All three women earned high praises for their skills as plantswomen, a proficiency shared by Steele.

McKim, Mead and White were responsible for many of the great estates built during this abundant time. Their reliance on landscape architects increased the acceptance and popularity of landscape architecture as a design art. It was also a period of remarkable progress in the quality of landscape design (Newton 1971).

Steele absorbed the ideals of European classicism in his travels, favoring the French traditions which saw expression in his use of forced perspective vistas, parterres and clipped allees. The concept of design having precedent over purely horticultural concerns was another product of the Country Place Era. It was an attitude Steele and Choate shared. "A passion for plants rarely seduced

this designer's eye." (Karson 1989, 71) Although he used plants to their design advantage and was an accomplished plantsman, he would rip out any offending vegetation that skewed his artistic creation. Choate once grew weary of the discussions over what to put in her newly acquired pots, and spent a day motoring about to collect weeds, which effectively ended the debate (Karson 1989). It was the design, not the plants, which appealed to the client and her landscape architect. This attitude is important to document because form did take precedent over the variety of plant or its species. Because Steele and Choate were willing to replace a given plant with another to achieve a certain design effect (such as form, texture, color), the staff at Naumkeag is free to replace improperly sited plants with hardier varieties, as has been done with the edging of the parterre in the Afternoon Garden. A hardy, dwarf variety of holly replaced the less hardy and more difficult to maintain boxwood first planted by Steele. The effect is the same, and the maintenance is easier.

Finally, Steele's sculpting of the South Lawn at Naumkeag is considered to be one of the first attempts at earth sculpture in America. Steele intended to introduce curves to Barrett's straight, Victorian lines with his sweeping views and wavy lines. He also cut the trees surrounding the Linden Walk to echo the curve of Bear

Mountain in the distance. According to Steele:

The vital importance of curving form which was begun on the south lawn here at Naumkeag, generated by the curve of Bear Mountain beyond and made clear in the curve cut in the woodland, was a satisfactory experiment. So far as I know it was the first attempt that has ever been made to incorporate the form of background topography into foreground details in a unified design (Steele to Esther Steele, 24 Sep 1950).

The Afternoon Garden was an adaption of the "outdoor rooms," seen in California by Miss Choate. Karson expresses Miss Choate's pleasure with the design when she said:

The small room was everything Miss Choate had hoped for and more. This was a distinctly American garden - a modern original that drew on the past in the spirit of play (Karson 1989, 118).

The Afternoon Garden was an east coast adaption of the patio style popular in California and a successful experiment for the young landscape architect.

2. ESTABLISH LINES OF AUTHORITY

a. Board of Trustees:

(1) Who are the indemnified members of the board and do they honor their fiduciary responsibility?

(2) At what level are the Trustees involved? Are they fund-raisers, docents, committee members or advisors?

The Trustees of Reservations owns seventy one

properties in Massachusetts, including Naumkeag. The corporate Trustees, nearly three hundred people, delegate decision-making responsibilities to the Executive Committee of the Standing Committee and the Advisory Council. A smaller group of fifteen members on the Executive committee make the decisions. Many Trustees statewide are involved with various aspects of the organization, from raising money to helping out at Spring clean-ups.

b. Committees:

(1) Does the institution rely on committees to make decisions, advise staff and involve the community? Do professionals volunteer for the institution? Do committees and their members serve indefinitely? Are they board approved to make decisions?

The Trustees of Reservations depends on regional and local property committees to advice staff in developing and managing the properties. Since the sites are widely dispersed across the state, the involvement of the local community is important. Members are selected based on personal interest, family involvement and ability to serve. Local committees are used to raise funds, collect information, guide tours, conduct research and aid the staff in administrative chores. Regional committees may be used

to review policy and conduct campaigns for land, resources and members. Committees serve in an advisory role and pass recommendations through staff to the Standing Committee for final decisions.

At Naumkeag, the local property committee is made up of sixteen members, three of which have "honorable member" status and do not regularly participate. Members include a descendent of Miss Choate, the Police Chief of Stockbridge, a landscape designer, a specialist in stage lighting, a past member of the Standing Committee and committed neighbors.

c. Staff:

(1) Who is the primary caretaker of the landscape? Who makes the final decisions on any changes in the landscape? How is the staff organized, and who answers to whom?

The landscape's primary caretakers at Naumkeag are the Superintendent and his grounds crew. This crew will vary in number from one full-time, year round employee to more during the season when available money and students determines the size of the crew. At Naumkeag, the Assistant Superintendent reports to the Superintendent. He and the House Administrator report to the Western Regional Supervisor. The Regional Supervisors report to the Deputy Director at the headquarters in Beverly, Massachusetts. This

is the chain of command for executing decisions at Naumkeag.

There is a property committee at Naumkeag which meets on an irregular basis to advise the staff on any issue relating to the mansion or gardens. Typically, the Superintendent will present suggestions for changes to this committee for their advice and consideration. Approval is given by the Regional Supervisor. Major projects, particularly capital expenses, would go to the Deputy Director in Beverly for endorsement.

3. RECORD KEEPING AND DOCUMENTATION

a. Define the Need for and Means of Keeping Accurate Records:

(1) Who is responsible for which aspect of record keeping? Will the daily records of additions and deletions be recorded by the primary caretakers? Will the historical records be kept by an archivist, librarian or curator?

Typically, a curator's responsibilities includes record keeping, recommendations for acquisition and care of the collection. In the designed historic landscape, the superintendent, or primary caretaker for the landscape should be involved not only in maintaining the collection, but also in the decision-making process in what is added to, or taken from, the landscape. This is when the local

committee's advisory role is often used.

At Naumkeag, the Superintendent records the daily activities and changes in the landscape. His thorough knowledge of the landscape makes him the best-suited to manage the accounts and make recommendations for changes. He works with the House Administrator in filing the records in a retrievable system. The staff is currently contemplating computerization of their files.

(2) What records are required? Will all plants added to or removed from the landscape be recorded? What replacements will be allowed? Will gifts be accepted and under what conditions? Is a collections management policy needed or available for adaption to the landscape?

At Naumkeag, it was the design, color, texture, shape and form of plants and architectural features blended together which was of the greatest importance to its designers. Steele and Choate shared a sense that the individual plants were of less importance than their total, arranged effect. When the lobelia faltered in the Afternoon Garden, Miss Choate embraced the black coal and pink gravel replacement offered by Steele since she had no great attachment to the plantings. "The experiment was a huge

success." (Karson 1989, 116) The "lollipop" locusts on the South Lawn are important for their shape and effect, rather than their species and cultivar. Yet the staff at Naumkeag has gone to considerable lengths to find the same species and cultivar to replace those which have grown out of scale and lost their intended effect.

The issue of receiving gifts is difficult for any institution which struggles for funding sources. A policy which clearly states the need for historical consistency and accuracy goes a long way in soothing a potential donor wishing to memorialize a relative with a planting and plaque in the garden. Often, the collections management policy used in the mansion can be adapted for the landscape. At Naumkeag, a policy for loaning objects is in place. This model serves as a starting point in the development of written collections management statements for both the house and the gardens. Therefore, the following statement is recommended by the author:

Because Naumkeag is a designed historic landscape, gifts cannot be accepted which do not fit the design intent articulated by the Designed Historic Landscape Management Policy for Naumkeag. Therefore, the institution cannot accept any gift which:

- is a threatened or endangered plant with an

unknown provenance.

- has not existed in the landscape before, and cannot be justified as fulfilling the designer's or owner's intentions for the landscape.
- comes with any restrictions on the gifts' use, display or rights to propagate.

No memorial plaques can be allowed in the landscape. Due to the potential for conflict of interest charges, the museum staff is not allowed to make appraisals of value to gift donors. It is the donor's responsibility to have the gift appraised for tax purposes.

Museum standards dictate that the Director must approve any deaccessions proposed by staff or advisory committees. This acts as a check point to insure personal taste does not dictate decisions. If an artifact is sold, rules concerning who may purchase the piece (Trustees and Staff are often excluded from receiving their museum's deaccessioned goods) should be clearly defined. No one person's tastes can dictate removal when historic accuracy depends on honest presentation of a certain lifestyle and era. Reasons for removal include: dead or diseased plantings, lack of information concerning provenance, the item not being original to the landscape or new research uncovering more accurate historical information.

(3) When will these records be made: daily, weekly, monthly? Are periodic evaluations of plants, architectural features or statuary made? If so, are the evaluations used?

Records should be kept by that person most familiar with the daily activities relating to the landscape. Evaluations are a important to conduct on a regular basis (minimum four times a year) in order to trace the changes and inevitable deterioration of the landscape. A standard form listing the key features (both plantings and architectural elements) of each garden or area can be developed which, when consistently used, yields a valuable record of changes in the landscape. An example of this form is presented in the appendices. These evaluations can be used to forecast budget requests for replacements, prepare working schedules for crews and provide discreet projects which can be used to attract funding. Obviously, catastrophic events such as storms should prompt immediate inspections with a camera and notebook to record any damage. These records become part of the archival record of the property.

(4) Why are the records important? Are budget forecasts made based on last year's records? Is funding determined by adherence to professional

**museum standards and accurate data on visitation,
gifts and volunteer hours?**

The importance of accurate record-keeping cannot be underestimated. Visitation numbers are important not only for funding purposes, but to evaluate the impact of visitation on the landscape. Naumkeag has experienced increased visitation with the publication of Karson's biography of Steele. In 1990, the season will open in late May instead of late June to accommodate requests from the local tourism bureau. Volunteers can be used to create and maintain record keeping systems when staff is overburdened, particularly during the busy season. Funding agencies look favorably on volunteer commitment to an institution, so accurate reporting of time spent by volunteers at the institution is necessary.

An inventory of the current contents in each garden or defined area provides a starting point for tracking changes in the landscape. This inventory can be used as the basis for the evaluation form discussed above. The inventory of Naumkeag's gardens is included in the appendices. Daily journals, coupled with historic records and files, can be a significant contribution to the site's history. What is most important is that all changes are consistently recorded. Document when and why something is added or removed. A record must be made because future

curators will need such information.

b. Preserving the Archival Records of the Landscape:

(1) What records does the institution own which relate to the site? Are there drawings, photographs, journals, planting plans, invoices for materials or correspondence?

(2) Where are the records kept? Are they stored under archival conditions? Do copies of key documents exist and are they kept in another location? If the institution does not own documentation, does it exist? Where is it located?

The Trustees of Reservations owns key documents relating to the design and development of the landscape at Naumkeag which are currently stored at the Western Regional Office in the Mission House at Stockbridge. Six drawers of drawings, numerous plant lists, photographs and a plant book kept jointly by Steele and Miss Choate provide ample evidence of the design intent for Naumkeag. Duplicate documents for some portions of the collection can be found among the Steele collections in Syracuse and Washington (See Section 1-c, page 42 above). Some photographs of the Barrett designed landscape are part of the Mission House collection and are irreplaceable. All documents relating to

the landscape are valuable, including design sketches of features never built, as these are primary resources for understanding how Naumkeag evolved. Archival folders have been provided for fragile materials, and a finding aid has been prepared. The next step is to copy all the maps and drawings onto a more permanent mylar material. The Superintendent is currently preparing a disaster plan for Naumkeag.

(3) Does the institution allow scholarly research? Do they limit access to fragile, irreplaceable documents? Is there a conservation policy? Are researchers charged for use of the collection and does that money go back into the collection?

Having a written policy about collection access for students, scholars and publishers saves the staff time and effort in answering inquiries about their site. A list of prices charged for photocopying, duplicate printing of slides and negatives and access hours (at the staff's convenience) should be included. Most researchers expect to pay for copies of the information they seek. Any items of a certain age or in fragile condition should not be handled and subjected to photocopying.

Naumkeag has been most generous in allowing students and researchers the use of their collection. The staff has benefitted from the work produced by scholars using the documents, yet the time investment is taxing on the overextended staff. There is currently no conservation policy in effect. As parts of this collection are reaching a critical age and fragility, stricter access is recommended.

4. USE OF THE DESIGNED HISTORIC LANDSCAPE

a. Establish Guidelines for Public Access to the Site:

(1) Is the property available to rent for commercial uses, such as fashion photography, weddings or private parties? What is the charge? Is there a contract? Does this use fit into the mission of the institution? Is this a much needed form of revenue? Is the landscape being compromised to raise money?

Historic sites of rare beauty are popular attractions for weddings, fashion photography and other commercial uses. A policy should be created which clearly dictates what activities are allowed on the premises. Fees should be determined for users in advance of their request so no favoritism can be allowed. This is important when the

membership or trustees wish to utilize the property. Having a written policy protects the staff and the property. Charge enough to cover maintenance and repair costs. Require a deposit. This can be an attractive source of income for struggling nonprofit organizations, but the cost and advantages need to be balanced with the preservation ethic of the institution.

Naumkeag does not have a policy regarding use of the property. When commercial photographers use the site, they are asked to donate photographs to the museum's archives. The site is used by The Trustees of Reservations for fund raising efforts and membership events, including an annual Garden Party. Miss Choate regularly entertained at her summer cottage, so there is historical precedence for using the site to host gala parties. The issue of over-use has not been a problem at Naumkeag.

21) Are there fragile areas which cannot sustain heavy visitor traffic? What is the maximum number of visitors the site can accommodate without damaging the landscape?

Naumkeag was created as a private estate. The landscape was never designed to accommodate thousands of visitors each summer. Some areas may need to be monitored for over-use. The rolling hills natural to this site make

some areas very fragile and subject to damage. Visitors can often be oblivious to the fragility of certain garden features. This past summer, the author watched a group of adults walking on top of the cypress posts that define the curve of the south lawn. Although an innocent act by an individual is not harmful, the accumulated stress of numerous such traverses spell disaster for the wooden posts. Compacted soil, sliding slopes, worn and bare spots or paths in the lawn are all signs of heavy traffic and potential sites of failure.

According to staff, public impact has not had a detrimental effect on the landscape to date. There are approximately nine thousand visitors during the summer visitation season at Naumkeag.

(3) How do the public amenities (rest rooms, parking, refreshments) fit unobtrusively into the landscape? Can those with handicaps be accommodated? Are there features which pose security or liability risks? What kind of signage directs visitors without destroying the ambiance of the historic setting?

The vehicular access to Naumkeag is one of its limiting factors. Parking is limited to a small three car forecourt along the driveway at the front of the house.

More parking could be accommodated by using the service roads and fields behind the house. This would create an orientation problem for visitors, since they would arrive at the back of the house. Only one bus can park in the driveway and there is no street parking along winding Prospect Street. The hilly terrain cannot accommodate wheelchairs without drastic changes in grade or the building of ramps. Since these changes would be expensive and would definitely alter the appearance of the landscape, Naumkeag is not considered accessible for the physically handicapped. This may become an important issue if federal laws require not-for-profit institutions to accommodate all handicapped visitors. The Superintendent lives on the grounds, and there is a security system in the unoccupied mansion. No issues of liability have been disclosed.

There is very little signage beyond a large display board on the west porch and The Trustees of Reservations sign at the street. The visitor receives a brochure with a map and some historical information with their admission fee. There is no gift shop or restaurant at Naumkeag, which is barely a half mile from the Main Street in Stockbridge where these facilities are available. A walk around the gardens at Naumkeag still evokes a private and meditative response reminiscent of its heyday as a private estate.

(4) What are the visitation hours during the season? What is the charge for individuals, groups, senior citizens and students? Are tours offered? Can the site handle bus traffic?

In 1990, Naumkeag will be open six days a week, Memorial Day weekend through Labor Day, from ten to four thirty. The admission charge is \$3.00 for the gardens only, \$4.00 for the house only and \$5.00 for both. Groups of fifteen or more receive a one dollar discount. There is not a separate charge for students or senior citizens and members of The Trustees of Reservations are admitted free. Bus tours and special groups must make an appointment to tour the house and gardens. This is necessary due to the parking limitations discussed above and the need to schedule docents to give tours.

b. Educational Programs:

(1) Is education part of the institution's mission? Is the landscape used as a laboratory for instruction? Is the landscape considered a collection and interpreted to the visitor?

The primary focus at Naumkeag is to preserve the landscape and interpret the property as a country house museum according to Miss Choate's wishes. The landscape is very much a valued part of the museum's interpreted message.

Education is limited to scholarly research related to Naumkeag, the Choate family and Fletcher Steele. The landscape is not used for instruction beyond its historical interpretation, which is provided by guided tours.

(2) Is the archival collection relating to the landscape's evolution and development a valuable educational resource? Does the institution collect materials related to the designer or landscape history?

Collecting at Naumkeag is limited to resources related to the Choate family, the house and the gardens. Unlike an institution such as Dumbarton Oaks, Naumkeag is not equipped or funded to act as a resource center or repository for landscape history. This relates back to the mission of the institution, which is primarily conservation and preservation. The archival records of Naumkeag are valuable for those studying this landscape only. The abundance of documents on Fletcher Steele located elsewhere makes this collection less valuable to the general scholar.

c. The Institution and its Resources:

(1) Can the organization dedicate sufficient resources to maintain the design intent of the landscape? What is the balance between preserving the landscape and using it to generate revenue?

Funding for the operation of Naumkeag comes from The Trustees of Reservations. This is one of seventy-one sites requesting funding from this private not-for-profit group with a conservative focus. Therefore, Naumkeag has initiated grants proposals and events which would supplement the dedicated funds from the Trustees. The first annual "Carriage House Art Sale," held in the shingle-style carriage house at Naumkeag, took place in 1989 to raise funds for the museum and grounds. Grant sources are reviewed by staff and suggested to the development personnel in Beverly. Recently, the staff has been successful in procuring funds from local organizations for special projects, such as the replacement of the locusts trees in the South lawn. Since no revenue is generated from commercial use of the property, that is not an issue at Naumkeag.

(2) What are staffing levels at the institution? Is there a dedicated and committed volunteer force? Will compromises be made in design intent to lower maintenance expenses? Can the landscape still be considered accurately preserved if compromises are made?

Currently, four full-time people manage the work at both Naumkeag and the Mission House. Two of these

individuals have responsibilities to the sixteen other sites in the western region of the state. Volunteer docents conduct the guided tours of the house. Volunteers are also used for mailings and office work. Thus far, the only compromises in design intent relate to badly deteriorated structures, such as the greenhouses, which were removed for liability reasons. Naumkeag has a very dedicated staff which has managed to retain historic integrity without major compromises.

Suggestions for Use of Model

At Naumkeag, preservation is the primary goal. Interpretation of the estate realizes Miss Choate's wishes, while maintaining sites of historical beauty fulfills The Trustees of Reservations' stated purpose. The loss of detail at Naumkeag is a compromise provoked by limited funding, resulting in barely adequate security and minimum staffing levels. But given the limits imposed by these factors, the staff at Naumkeag has retained a remarkable level of accuracy and meticulous maintenance rarely seen at similar historic sites. The dedication and resolve of the staff at Naumkeag is an inspiration to other struggling sites. With very little compromise and persistent dedication to historical accuracy, the staff has retained the essential design intent created by Steele and preserved

by Miss Choate and The Trustees of Reservations.

Although some questions appeared in more than one section, the model attempts to direct the reader through a thinking process which evaluates all aspects of the landscape's preservation. Starting and ending with a clear concept of their mission, staff reviews all the issues which affect how the landscape is managed and encourages consensus on its design and its interpreted meaning. The policy outline allows different kinds of institutions a framework for establishing:

- design intent and its significance to the interpretation and maintenance of the landscape,
- parameters of responsibility and decision-making,
- rationale and means for a record keeping system, including a collections management policy and archival preservation program,
- consensus on policy for using the landscape.

Daily maintenance decisions which affect the landscape can take on new meaning to the person with a clear and focused view of the purpose in their work. Understanding the historical value of a landscape by relating individual efforts to the intentions of the original owner and designer does not have to be an academic exercise. Time spent reviewing the purpose, the

preservation ethic and the design intention of an historic landscape can mean the difference between removal of an irreplaceable plant or artifact and stopping long enough to question its meaning and its place in the design scheme.

Perhaps the best application of this model is to gather important historical information (such as maps, photographs or writings) and conduct an inservice training program for staff, volunteers and Board members. The curator or superintendent most familiar with the resources relating to the landscape is the logical person to lead this educational session. Make the time comfortable, yet challenge the participants to consider their personal views of the landscape and its purpose. Encourage interaction by asking questions and using examples from the landscape. The discussions can provoke startling information and attitudes about what role an individual believes they play in the greater scheme of preservation.

Next the author would encourage management staff to draft a policy, using the outline provided, to articulate the institutional attitude towards the landscape and how it is being preserved. Policy formulation is always time-consuming, yet invaluable for communicating the importance of understanding and respecting design intent and its relationship to historical accuracy, honest interpretation

and genuine preservation. Having a policy cannot guarantee accurate preservation, but it can be the tool which builds consensus for understanding critical design elements, introduces new trustees, volunteers and staff to essential preservation issues inherent in a designed historic landscape, and documents the curatorial management of the landscape. Consistency of management despite personnel changes is an important benefit of preservation policy.

Management of change over time has always been the preservationist's greatest challenge. When the object is a designed historic landscape, where daily plant growth and architectural deterioration constantly alter the integral designed relationships being preserved, some means of consistent, sensitive and enlightened control must be applied. The "Designed Historic Landscape Management Policy" presented in this thesis is an attempt to impose curatorial standards on the landscape's caretakers and managers. The outline form allows each institution to develop an appropriate policy which is unique and meets the institutional mission. The designed historic landscape is a work of art, unique for its location and time and creator. Preserving those individual qualities which together form art is a challenge that can be met. This policy is another tool now available to caretakers in meeting their preservation goals.

CHAPTER 4

SUMMARY AND CONCLUSIONS

The policy model, evaluation form and sample inventory of Naumkeag were all developed to assist caretakers in their role as stewards of our historical and cultural resources. Preservation depends on accurate documentation, a keen understanding of value and relationships and sufficient funding to accomplish the institutional goals.

In the past, designed landscapes associated with historic sites were considered "frosting," and not really an essential element in the interpretation of the property. This attitude is changing as historians and preservationists recognize just how much of our heritage can be interpreted from the way we use the land. Yet there is still little information available to the small institution which can guide the staff and trustees in understanding and developing a preservation policy for their landscapes and gardens. The "Designed Historic Landscape Management Policy" offers a tool for the development of preservation policy unique to

the landscape and the institution which prepares it.

In applying the model to Naumkeag, the author found certain issues that all users should address. First, the need for a board-approved Mission Statement is essential. Since this did not exist at Naumkeag, it was the first order of business. The staff had wrestled with the wording of such a statement for a long time. It was not until our fourth meeting that we agreed to use only the words of Miss Choate and the policy statement printed in the brochures of The Trustees of Reservations. This general but encompassing statement allows flexibility while honoring the intentions of the donor and the chartered purpose of the institution. Since the management policy depends on a Mission Statement for goal clarification, this need cannot be overlooked.

Certain issues directly related to the history and development of Naumkeag occupied much of the discussion time and are not relevant to the model's design. The staff was able to point out weak areas in the style and format of the model which lacked clarity and purpose. The model has been improved to include the issues of institutional resources and use of the property as a revenue producing commodity. Another factor emphasized by the staff at Naumkeag was the need to constantly relate the individual components of the landscape to the entire property, to see and retain the

spatial and circulation patterns as they were designed. Even if there is a lack of consensus about how successful these patterns are in moving people through the landscape, the intentions of the designer cannot be dismissed, and indeed should be defended. In discussing parking and handicap accessibility, these patterns proved to be a deterrent for accommodating large numbers of people. The staff agreed that limiting the number of visitors was a better solution than changing the patterns from their original orientation. In this instance, the model succeeded in prompting discussions and decisions based on preserving design intent and historical integrity.

Another conversation centered around the use of historical photographs in recreating or replanting certain gardens. If the photograph could not be dated or substantiated by other documentation, how reliable was its use in changing an established planting? What if the furniture, pots of plants or statue were moved to accommodate the photographer? What if the planting only existed one season because of a failure in plant selection? We agreed the existence of plans did not necessarily mean the garden was planted as drawn. It is important to look for collaborating evidence such as photographs, orders for plants or journals kept by the gardener, owner or designer. Every piece of documentation relating to any aspect of the

design must be preserved for this very reason. Sometimes it takes years of working and studying the landscape to understand the integral relationships which took Miss Choate and Steele thirty years to explore and develop.

The real question the staff asked was, what now? What will this model do for us? The author maintains that the discussion provoked by the model's questions was a valid exercise in educating everyone concerned in the importance of design intent and its preservation. The questions highlighted areas of insufficient research or incomplete records, prompting the staff to look for documentation to answer the questions. The inventory of the individual gardens and areas at Naumkeag was developed as an informational tool for evaluating the components within the context of the whole landscape. The evaluation form can be used to track the condition of these components over time, adding to the historic documentation needed by future caretakers of this landscape. The details of the landscape form the fabric of the whole, and need to be documented, understood and placed in context. In understanding that preservation of design intent maintains historical integrity, the staff and trustees will create and execute policies which honor the landscape, its designers and its donor.

The model's greatest strength lies in the use of

questions to provoke discussion. Beginning with a clearly defined statement of purpose, the questions walk the user through situations common to historic sites. Application of the model to a case study illustrates the individuality of a site. Some questions which do not apply to Naumkeag still needed to be addressed by the model. One example is the concern for the "borrowed landscape," which does not affect Naumkeag but is critical to many designed landscapes.

The four divisions in the model move from the institutional philosophy to the details of the particular site being examined. This finer focus draws the staff formulating policy into a common circle of understanding, starting with a donor's vision and working towards consensus on how to maintain that visionary focus. Understanding why a designer created certain aspects of the landscape, such as circulation patterns, gives the decisions-makers concrete information to use in evaluating such issues as handicap accessibility or limiting numbers of visitors.

The model is long and some sections overlap (such as those which address record-keeping). In attempts to eliminate duplication, the author felt valuable emphasis on documentation and archival storage would be lost. Primary sources of information are the backbone to understanding design intent, so repetition serves to make that point

clear. The landscape changes too much over time, with or without intervention, to not preserve every shred of evidence about its history and development. Modifications of the model for individual use are welcomed, since the value of the model lies in its use to prepare landscape preservation policy.

Preserving art executed with dynamic materials is a challenge not easily met. There are no right answers, no standard philosophies, that can be applied to every designed landscape considered worthy of preservation. This model is a tool available to those charged with preserving the dynamic elements of our cultural heritage. Its use may provoke more questions than it answers, but it is the provocation which will bring discussion, understanding and perhaps a consensus that what we do (or do not do) in our role as stewards forever affects the preservation of the designed historic landscape.

GLOSSARY

Accession - This term is used as both a verb (the process of creating a record for an object) and as a noun (an item added to a collection). Commonly used by museums and libraries, it relates to the record-keeping system used by that institution.

Acquisition - An object that is added to a collection by taking full possession of it through an administrative, record-keeping process is called an acquisition.

Adaptive re-use - A preservation term applied to a historic cultural resource which is modified for contemporary use while retaining some elements of its historical association.

Allee - The walkway or passage through a symmetrical planting of trees, usually spaced at an even distance apart. An element often found in a formal, designed landscape.

Archive - The term used for any documents, maps, plans, photographs, etc., which relate to a particular place or person. Archive is also used to name the place where these documents are held.

Artifact - Primarily referring to a primitive tool or weapon, it is any object created or modified by human work.

Collection - The sum total of objects (accessions) owned by, cared for and used by an individual or institution.

Conservation - Generally meaning protection from loss, it is considered a passive process of preservation or stewardship by landscape preservationists. In the museum field, conservation implies a more radical process requiring physical intervention with the fabric of an object, such as in repairs and cleaning of art objects.

Cultural resource - Any object or biotic element created or affected by human activity which has significance in the course of history.

Deaccession - Although not listed in standard dictionaries, the term is commonly used in the museum field to describe the process of removing an object from the institution's collection.

Designed historic landscape - The product of a person or person's conscious efforts to create and control views and movement in an outdoor setting which gains value as a cultural resource because of its uniqueness, location, beauty or reputation of the creator. See chapter one for the National Register definition.

Design intent - Defined also in chapter one, the term refers to the overriding creative objectives of the designer in meeting the needs and desires of the client and understanding the features of the landscape.

Finial - The decorative top or crowning ornament on an architectural feature which tends to project upwards.

Forecourt - A formal automobile court located near the front entrance of the house and reached by a formal approach.

Historic landscape report - A research document which discusses and evaluates the archival and field resources of the landscape and makes recommendations for preservation management.

Historic landscape survey - The report collects all data (graphic, field and archival) relating to the history and current condition of a landscape or group of landscapes. It is more comprehensive than the historic report and can be applied to a single property or group of landscapes in a community, state or nation.

Integrity - A quality implying wholeness, or perfection, in preservation it defines the level of authenticity based on how much evidence remains of a site's historic past. The National Register uses the seven criteria: location, design intent, setting, materials, workmanship, feeling and association to determine integrity. Comparison between the present and historic condition forms the basis for understanding integrity.

Interpretation - Generally, it is the expression or explanation of a person's concept of art, music, etc. In the museum field it is a process of gaining knowledge of or being educated about a certain object, collection or cultural resource by means of written, spoken, or visual presentation.

Mission statement - Sometimes called a statement of purpose, it is a broad but concise, board-approved articulation of an institution's unique contribution to the public it serves.

Object - Any material thing of historic, cultural, scientific, aesthetic or functional value which is related to a specific place, environment and time.

Parterre - A level space decorated with elaborated shaped flower beds which is best seen from above, a floral carpet.

Preservation - The least disruptive process used to sustain integrity, form and materials that make up a historic object or site. It means stabilizing and maintaining the specific qualities of the preserved object or site in the same physical condition in which the curatorial institution received it, without adding to or subtracting from the aesthetic essence of the object or place.

Restoration - A preservation process involving manipulation of the object or site which would return it to its previous physical condition and reclaim its historic appearance. Often this technique is used to remove inappropriate changes made which detract from the defined historic period of the object or site.

Significance - Having importance, expressiveness and consequence, historic significance is determined by: association with a community, culture or person, having importance as a work of art, an artistic style, having accomplished craftsmanship or showing uniqueness to the location, materials or time the object or site was created.

View - An unobstructed line of sight from one location into a landscape or vantage point. Plantings and structures are designed to accent a particular feature (such as a mountain, lake or skyline). A view is composed of a foreground, middle and background.

APPENDIX A

An Inventory of Design Intent

An inventory is a comprehensive listing of all the elements, which contribute to the design intent and give that landscape historical significance. Depending on the size of the property, the site can be treated as a whole or divided into more manageable units of information. Each inventory begins with a brief summation of the importance of that area to the property, then describes the key features which constitute the components and essence of the designer's intent. Issues such as form, function, relationships, scale, circulation, use of color and description of materials should be considered in giving each component a priory rating. This inventory is used to evaluate the condition of the landscape. Finally, the evaluation is used as a guide in planning and implementing maintenance procedures which respect and accomplish the preservation of the landscape. According to Peter Hornbeck, landscape architect and garden preservationist:

the ongoing maintenance of the garden is integral to the evolution and the resolution of design intent (Hornbeck 1982, 128).

The following inventories for the gardens at Naumkeag provide an example and can be used as the basis for conducting periodic evaluations. Maintenance decisions are made in response to the conditions found in each area. The gardens and areas are identified based on The Trustees of Reservations map of Naumkeag, included in these appendices, which visitors are given with their admission ticket.

An Inventory of Gardens at Naumkeag

1. AFTERNOON GARDEN

The first garden designed by Fletcher Steele and built between 1926-1929, this "outdoor room" extends the living area out from the library of the house, preserves the western view of the mountains and provides a comfortable space for entertaining and watching the glorious Berkshire sunsets. Steele drew from Italian, French and Spanish influences in designing this eclectic garden which features:

a) The bronze statue "Boy With Heron," designed for the Choates in 1890 by sculptor Frederick Macmonnies. Strategically placed in the southwest corner of the patio on a pedestal, this large sculpture anchors the edge of the "room" and carries the eye into the mountain view beyond.

b) Seventeen wooden "Venetian gondola posts," topped with carved finials painted in "strong and gay colors" which imply enclosure without blocking the mountain view. Heavy ropes connect the posts, upon which virginia creeper and clematis vines grow.

c) In the center of the brown flagstone patio, a french knot parterre, edged with little-leaf holly, creates a carpet for the "room." The inner spaces of the knot are mulched with black anthracite coal and crushed, pink gravel. Nestled within the knot are four small, round fountains with tiny jets and a black mirror-glass pool (to reflect the sky's light) in the center. Another gargoyled-faced fountain spills water into a lead urn on the eastern side of the garden.

d) Color is provided by pots of plants: fuchsia, african lilies, yellow calla lilies, as well as polychromed cast-iron furniture. Steele designed pink concrete Roman thrones with matching stools to further enhance the colored features in this garden. Miss Choate would sit for hours and dead-head the multiple pots of fuchsia lined along the western wall, where iron pot holders secured them.

e) The eastern, driveway side is enclosed by a brick wall with a heavy wooden gate. Steele decided to include a large, existing American elm three feet inside the wall to give the garden an immediate sense of age. The elm

provided a high canopy of shade. It was lost to Dutch Elm Disease and has not been replaced. More shade is provided by grape vines which grow like an awning from the side of the house, casting shade along the garden's edge.

Complete with the sound of water, bright colors, comfortable seating, a gorgeous mountain view and providing an extension of the house, the Afternoon Garden was "all Miss Choate had wanted and more." (Karson 1989)

2. TOP LAWN AND PERUGINO VIEW

Steele redesigned a porch into an open veranda, creating a western vantage point from the house on the upper terrace Barrett created in the 1880s. Once again, "the view controls all things at Naumkeag." (Steele, 1933)

a) In what Steele called "the Perugino View," he constructed the foreground with an espaliered apple tree, framed the middle view with the giant white oak and arborvitae and swept the eye across the orchard and fields of the lower terrace into the mountains beyond. Perugino was an Italian landscape artist in the fifteenth century whose specialized in perspective paintings relating the foreground, middle and background views.

b) The Great Seat was built in 1932 as a retaining wall on the western edge of the Top Lawn. It has intricate embellishments, stone coping and ample seating room, offering a great view of the summer sunsets for a large

group of people. Two stone "idols" and a lead cistern adorn either end of the Great Seat. Two massive elms were planted (Steele ordered thirty-foot trees moved in) on the north and south sides of the western edge of the terrace to give shade to the four beds created by Steele. These trees have also died of Dutch Elm Disease and have not been replaced.

c) These four terraced beds contain the espaliered apple tree (used as the foreground in Steele's Perugino view) and three beds of tree peonies where Barrett had once had grass. The terraced beds were created to eliminate mowing the steep slope. Miss Choate collected rare tree peonies from growers all over the country. These beds were reworked and the stone walls rebuilt by The Trustees of Reservations in the late 1980s.

3. SOUTH LAWN AND OAK TERRACE

Originally a steeply sloping, grassy lawn, Steele and Miss Choate decided to use abstract sculpted forms to mold the earth southwest of the house. Steele said the South Lawn:

incorporates the form of background topography into foreground details in a unified design (Steele 1950).

Miss Choate began the earthwork when she purchased several truckloads of soil being taken to the dump (Karson 1989). The mounds of soil took years to scrape, haul and mold to Steele's exacting specifications, which mimicked the curve

of Bear Mountain in the background and the curving cut of the woodlands near the Linden Walk. This earthwork is reportedly the first such design executed in this country.

a) The perimeters of the western edge were determined by the root system of the great oak and defined by curved wooden edging and a rock promontory. Curving brick service tracks lead the eye past the huge oak to the rock promontory. The white oak is a primary feature in the South Lawn as well as an historical artifact of the property.

b) The upper edge was defined by twelve "lollipop-shaped" locust trees which cast sweeping shadows across the upper lawn and shaded the visitor heading for the pagoda at the far end. Only ten remain and will be replaced in the summer of 1990. Japanese knotweed holds the slope just below the locusts.

c) It would be a few more years until the cast-iron pagoda was added as an accent at the southern finger of the curve. Miss Choate painted it with garish colors and placed a sacred stone upon a Ming pedestal inside. Four scalloped-edged clamshells line the bed in front of the pagoda.

d) A grove of Japanese maples trace the eastern edge next to the pagoda, while a double hedge of hemlocks screens the driveway. It was Miss Choate's idea to double the planting when the single hedge looked thin. The

hemlocks are clipped higher and higher towards the southern edge of the lawn which accents the molding of the lawn just below.

4. THE LINDEN WALK AND ROND POINTE

Mrs. Choate saw an allee of linden trees in Germany, which she admired and added to her landscape in the 1890s.

a) Originally sixty linden trees were planted on eight-foot centers. The encroaching woodland surrounding the passageway has shaded the lindens and today only twenty-eight remain. In 1989, the crew at Naumkeag removed several of the forest trees, opening the Linden Walk to more light, increasing air circulation and promoting better health for the remaining trees. The path is moss covered in the dark shade. The woodland trees were those cut by Steele when he wanted to match the curve of distant Bear Mountain to the middle ground view seen from the Afternoon Garden. Without consistent pruning, this curve has long since disappeared.

b) Halfway down the Linden Walk is a small fountain with a statue of a child holding a fish. At the terminus of the walk is a stone statue of a female figure and a cast-iron bench. Hidden in the Woodland Walk is a pet cemetery with several stone headstones marking the burial sites of Choate family pets.

c) Named after a clearing in the woods, the Rond Point connects the South Lawn, the Linden Walk and the

Woodland Walk. It is a small, circular, moss covered (and often muddy) area with a teak seat built on an ornamental brick wall at the eastern edge of the clearing. The decorative top of the bench is painted with the bright colors used in the pagoda.

5. WATER RUNNEL AND BIRCH WALK (BLUE STEPS)

Water from the Afternoon Garden fountains flowed down a brick runnel to the cutting gardens at the bottom of the sloping south lawn. The bricks were laid unevenly to cause an irregular ripple as the water moved across them. In 1938, Miss Choate asked Steele to design some steps to the lower cutting gardens, fearing she would slip on the wet, sloping grass. "Little did I know what I was in for," said Miss Choate when the drawings for the "Back Steps" were presented (Karson 1989).

a) Steele designed four sets of concrete steps which divided on the landing and turned back on themselves, each at a different steepness. The water from the brick runnel made its way to the cutting gardens below by channels in the center of the steps, each step had a basin with an arched roof which echoed the water's sound. It was Steele who suggested the concrete structure be painted. Miss Choate had a day of it, asking friends to join her in painting the arches, basins and curving outlines in bright yellow, red and blue. Over time only the bright blue in the

basins remained and now give this feature its name, "the Blue Steps."

b) White, curving pipe railings were added on either side of the steps, perhaps as much for safety as style. Miss Choate was then in her late sixties. Painting the curving railings white created the need for more contrast. Steele used plants to complete the effect of the architectural features.

c) Paper white birches were ordered in several sizes to give a natural feeling for the grove of trees surrounding the steps. The white of the railings and the tree's bark added drama to the hillside staircase. Birches may be added at different sizes whenever necessary, since this is very much in keeping with the natural style Steele intended in the grove.

d) Hedges of evergreen yews were planted behind the white railings to make the curves more evident. Because of the shade created by the birches, the yews need regular replacement.

6. ROSE GARDEN

The last full garden added to the property (1953-55) was a parterre rose garden on a small piece of lawn in the northeast corner of the upper terrace. Miss Choate wanted roses, but was quite elderly by then. Steele designed more

of a picture than a place, so Miss Choate did not have to descend the steep stairs to enjoy her garden.

a) Steele created an abstract picture designed to be viewed from above. Four waves cross the lawn, each dotted with scalloped-edged beds of floribunda roses. Called a stylized curve of a traditional Chinese scepter, the design has also been referred to as a sacred mushroom (Karson 1989). The same pink gravel used in the Afternoon Garden is repeated here in the wavy lines mulching the areas between the beds of roses.

a) In the 1940s, a recessed tool shed and three compost bins were added along the western wall below the arborvitae allee. The supporting columns and chain swag were painted purple, a color Steele considered "particularly unobtrusive outdoors." (Karson 1989)

c) Beds of lilies and other perennials line the northern edge of this garden. Originally, a large elm anchored the eastern edge near the service road and provided a classic high canopy. When it died of Dutch Elm Disease, another scalloped bed of roses was added at that spot by The Trustees of Reservations.

7. CHINESE GARDEN

The creation of the Chinese Garden erased the upper terrace planting of perennials designed by Barrett and replanted later by Marion Coffin. Miss Choate had collected

numerous oriental artifacts during her travels in Japan, China and Korea and asked Steele to find a home for them. Steele's own travels in the Orient gave him ample ideas for this garden.

a) The Temple was situated at the property's highest point, along the wall next to the driveway on the eastern side. This height gave the visitor a commanding view of the mountains and valley, a dramatic departure from traditional Chinese gardens, where the focus is inward rather than out. The Temple roof is made of cobalt blue tiles from China and the building was once filled with Miss Choate's treasures. Most of these artifacts have been stolen, damaged or removed for safe keeping. The remaining pieces include a set of stone lions on either side of the steps leading into the temple, a Needle Rock nestled among the ginkgo trees, a marble table and pin cushion chairs and marble boxes for plants.

b) The entryway into the Chinese garden from the Arborvitae Allee is called a "Devil's Screen," which is a turned doorway designed to thwart the devil from entering the garden. The walls which enclose the garden were painted in six shades of red by Steele, lightest at the top and darkest at the bottom, to imply ages of rain.

c) The plantings inside the Chinese Garden evoke oriental themes. Butterbur, with its large, lotus-like

leaves is an understory planting to a grove of nine ginkgo trees. Lacebark pine, tree peonies, Japanese white pine, bamboo and flowering crab are used throughout the Chinese Garden to give age, grace and a sense of oriental mystery to the garden.

d) The Moon Gate, built in 1955, was the final collaboration between Steele and Miss Choate and the finishing touch in the Chinese Garden's design. A circular opening in the brick wall at the southern end of the garden, the Moon Gate frames a view of the house from inside the garden and is a close copy of one seen by Steele in China. This is the final curve Steele added to Barrett's rectilinear design.

8) EVERGREEN GARDEN

The only remnants of Nathan Barrett's design are found in the Evergreen Garden and arborvitae allee.

a) The arborvitae allee was planted by Barrett as a connector between the upper terrace, where the Chinese Garden now stands, and the lower terrace, site of the Evergreen Garden. The arborvitae have outgrown their scale relationship and despite regular clipping, the trees are too large for the space and are in declining health due to age, disease and storm damage. Consideration should be given to their removal and replacement.

b) The Evergreen Garden contains a stone bench, two

urns and the center fountain, which are all that remain of Barrett's work. The original plantings were replaced by Steele with dwarf and unusual evergreens when the Chinese Garden was built. Annuals were replaced with boxwood, yucca and groundcovers such as kennilworth ivy, periwinkle and ferns. This garden is overgrown and struggling to convey any sense of design intent. Radical pruning and removals are recommended for this garden, since the Barrett design has been usurped and the Steele design allowed to grow out of scale. As it is, the Evergreen Garden is more of a jungle and tells the story of uncontrolled growth and the loss of design intention and perspective.

Admittedly, this inventory does not identify every plant in each garden. This information is readily available to the staff at Naumkeag thanks to the work of Yankee Intern Deborah Howe which was completed in 1987. Those plantings whose colors, textures, forms and spatial relationships help define the intent should be identified in such an inventory.

The inventory, the evaluation form and the Designed Historic Landscape Management Policy are tools offered to landscape preservationists in their attempts to accurately, honestly and respectfully preserve the proportions and qualities which the garden designer conceived in creating a work of fine art.

APPENDIX B

EVALUATION FORM - DESIGNED HISTORIC LANDSCAPE

Date of Evaluation: _____ Garden/Area: _____

Last Evaluation Date: _____ Evaluator(s): _____

IDENTIFY key feature and DESCRIBE condition. Rank feature most important to design intent first. See rating scale at bottom of page.

I. PLANTINGS (Trees, shrubs, hedges, groundcover...)

Feature:

Condition:

- a) _____
- b) _____
- c) _____
- d) _____
- e) _____

- a) _____
- b) _____
- c) _____
- d) _____
- e) _____

II. ARCHITECTURAL (Fountains, steps, walkways, fencing...)

Feature:

Condition:

- a) _____
- b) _____
- c) _____
- d) _____
- e) _____

- a) _____
- b) _____
- c) _____
- d) _____
- e) _____

Condition Rating System:

NC = no change since last evaluation.

1...very poor condition, detracts from design intent, remove/replace.

2...threatened, soon to expire, plan to remove, replace soon.

3...average, shows age, still fulfilling intent, watch for signs of rapid deterioration.

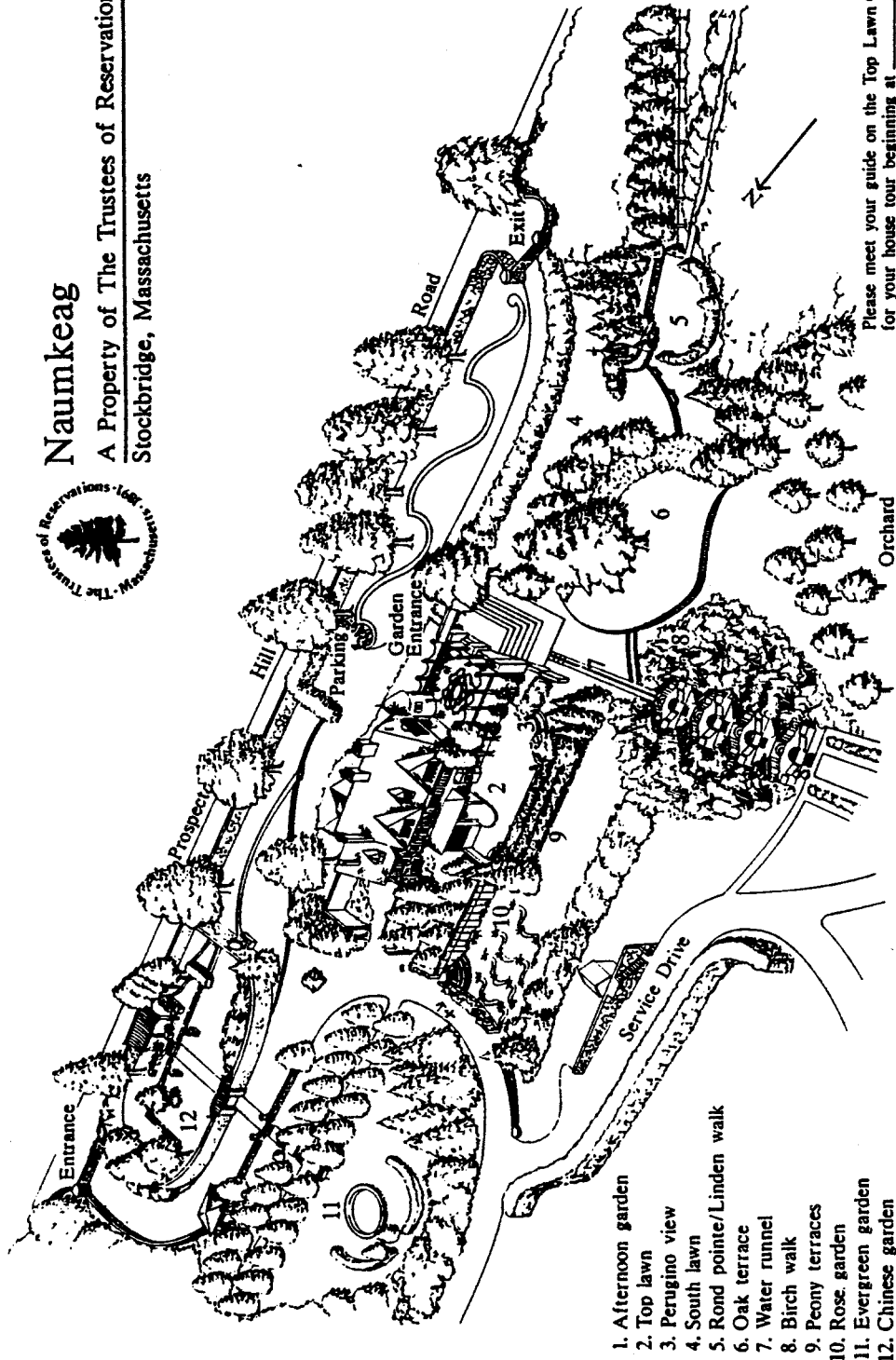
4...good, plant/feature fills intent well.

5...excellent, plant/feature recently replaced/repaired.



Naumkeag

A Property of The Trustees of Reservations
Stockbridge, Massachusetts



1. Afternoon garden
2. Top lawn
3. Perugino view
4. South lawn
5. Rond point/Linden walk
6. Oak terrace
7. Water runnel
8. Birch walk
9. Peony terraces
10. Rose garden
11. Evergreen garden
12. Chinese garden

Please meet your guide on the Top Lawn (2)
for your house tour beginning at _____

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