

Interview with Pamela Seager, Executive Director of Rancho Los Alamitos,
Components of a Long-Term Preservation Plan (3)

Dorothy Fue Wong conducts the interview.

Wong: In our discussion about long-term planning, you mentioned master plans for both the buildings and the landscape. Do you want to comment on that briefly?

Pamela Seager: Yes they are part of a larger comprehensive *Master Plan document*. When I say “long term”, normally a master plan lasts about fifteen to twenty years, at which point it needs to be revisited because not only have you implemented a lot of recommendations, circumstances may have changed, funding availability has changed, so it is probably time to develop the next generation of Master Plan to guide the next fifteen to twenty years in light of current circumstances.

The *Master Plan* is the umbrella document that summarizes the other supporting documents that are usually more detailed plans. For a site like Rancho Los Alamitos those supporting documents are the *Historic Structures and Architecture Plan*, the *Cultural Landscape Plan*, and most importantly for an institution like ours, the *Interpretative or Educational plan* which gives the intellectual direction for the presentation and any needed restoration of the site.

These three documents plus a *Budget and Implementation Plan* fall under the umbrella of the Master Plan. The Master Plan itself summarizes the other plans, puts them into context, and also lays out other aspects of the site such as traffic flow, visitor capacity, parking studies, off-site directional signage - those items that come into play in the overall public presentation and everyday working of the site.

Wong: Pamela, please discuss the major components of the Master Plan.

Pamela Seager: It is very important to think about what you want for the end result, and to have some equality and evenness between the various plans so that they are addressing issues in a balanced manner. In our case we developed a matrix for what we wanted to achieve which was ultimately the restoration of a site to support a dynamic and relevant educational presentation to the public. The first thing was to do an *introduction* to the Master Plan for the general reader, then to provide a *contextual history* of that component of the site. For instance, not only did we want the history of the gardens, we were very clear to our garden historians that we wanted the evolution of the gardens at Rancho Los Alamitos to be set within the context of the development of landscape architecture in Southern California and California.

We felt it was important for the reader and for us to gain a sense of where our landscape fit within the larger regional statewide or national context. The same with the Historic

Structures and Architecture Report, and the Interpretive Plan. For the Historic Structures Report, there was a contextual look at the history of the evolution of the ranch style house in California, from the Hispanic period through to modern times when the ranch house style architecture became the hallmark of many residential housing developments.

Each report had an *inventory and a description of existing conditions* and it was from that area that we could then pull out the *preservation and maintenance guidelines*. The inventory provided us a snapshot of existing conditions, the point at where either the garden or the structures were at that moment in time. This was critical to developing the preservation and maintenance guidelines. We also realized from the data-gathering process that in this master planning effort we would not be able to cover all topics. However, along the way we were uncovering topics that should warrant more in-depth research. Therefore each document had an *appendix listing future research topics* which should be explored, but which were not within the scope of work for the master planning process.

Wong: So in summary, the components for both the buildings and the landscape plans are the introduction, the history, the inventory and description of existing conditions, and the preservation and maintenance recommendations, which includes the priority of projects and their costs, and then the appendix with various reference documents cited.

Pamela Seager: That is correct but the one thing I should emphasize is the singular importance of the *Educational or Interpretive Plan*, which is the third supporting document and is the primary guiding document for the overall process. For instance, the architecture team needed to know if the educational team was going to require exhibits. Are they going to require a new building? How are they going to tell the story at site and what are the mediums or the physical outcome that the recommendations of the Interpretive Plan dictate? There always is a physical outcome, be it a building, exhibits, signage, a docent, an information kiosk, etc., because you need tools to tell the story of the site or place.

The Educational or Interpretive Plan really sets the direction for the remainder of the studies, and the plan is an educational and intellectual matrix. It doesn't have quite the same elements because there is no inventory of existing conditions, except the place itself and its history. It's a plan that answers questions such as what does this place mean, what should it say today to the audiences that come, what is the essence of the place, what are the major ideas that we want to get across, and then what are the mediums for telling those stories or expressing those ideas to the public.

Wong: I would like you to comment, Pamela, on the importance of this component – the Educational or Interpretive Plan to communities such as the Stein Garden Cities.

Pamela Seager: The Education or Interpretive plan is really at the heart of the question of why you are undertaking this restoration at all. Who are you doing it for? What does this place have to say to people today that is meaningful? Answering those questions is fundamental to developing the Interpretive Plan. The word “interpret” means to ascribe meaning to something within its historic and contemporary context. It is not the same as “description.” For example, I can describe a shaving mug as being made in New York in the 19th century, indicate that it is porcelain, and made by xyz manufacturer – that is “description.” If you’re interpreting something, you would say here we have a shaving mug. What does a shaving mug mean today? It means that people shave, why is that customary, does that mean that beards in our culture have a particular social connotation and why is that? So you are exploring the meaning behind the object or place. And that’s what your interpretive plan does. From that emanates the major messages because you are looking at the essence of a place. Then you are able to ask, what I want to say to people about it, how do I want to say it, and who is the likely listener. What is it about this place that will resonate with that listener today?

With a place such as the Village Green, your primary audience is presumably the residents, but other interested audiences might be other planned communities, universities, and others who are looking at what that landscape means for today in light of the moment in which it was developed and how it has evolved.

Wong: Pamela, the Garden Cities have no museums and also they have websites that have the educational and interpretive meaning of the site too. I would like to ask why each of these components is necessary. Why is an *Introduction* necessary?

Pamela Seager: The Master Plan documents are likely to be read and used by a fairly broad audience, some of whom may only touch upon them lightly but each will use the documents for their own needs and so each document must both stand alone and be part of the overall planning matrix. Audiences beyond the residents might include staff and consultants, donors, funding agencies. Therefore the introduction in each document helps to provide the roadmap for the reader so that they know where they are going with this document, what it will set out, and it provides an overview of the site and the nature of the place that you are exploring.

Wong: Why is the history important?

Pamela Seager: The *history* is critical because it is what it is and you must respect and accept that fundamental fact, otherwise you are in danger of creating a Disneyland. Therefore you need to have a very clear, objective, appropriate and accurate history of the site. And I believe the history has to be contextual so that you understand why this place is the way it is, how it has evolved over time and how it fits within the broader context of other structures or places that are similar in nature.

Wong: We did talk about the Educational and Interpretive plan and its importance. Why is an *inventory and description of existing conditions* important?

Pamela Seager: It provides the data base for developing the recommendations for the preservation and maintenance guidelines for the resource. The inventory tells you what is here now, whether it has historical integrity and what the condition is at this moment in time. The condition evaluation helps in looking at how deteriorated is the component of the site; is it in good shape or pretty bad? It also helps you in measuring your accumulated deferred maintenance because it is likely that it will take you a long time to implement your plan, so you must be able to prioritize the recommendations. Can it wait five years or not? This helps in determining a hierarchy for your recommendations because there will be some recommendations that fall within an urgent category and for a number of reasons need to be immediately implemented. There will be others that can be implemented and grouped together in a sensible way to achieve the most cost-effective implementation program.

Wong: Please comment on the next component, *preservation and maintenance guidelines*.

Pamela Seager: It has been my observation and experience that the most to execute a body of Master Plan recommendations, if done at all, will take ten to fifteen years. That is because each recommendation has to move from a conceptual idea through a design process or implementation plan process so that the cost can be estimated, and the funding secured. You then have to select and contract your vendors and construction people, etc., so you are not going to implement all those recommendations at one time. Therefore, maintenance guidelines and some preservation guidelines are extremely helpful in managing and holding the status quo while you do look for funding in order to implement. And obviously you want the prioritization of what should be done first, what is most critical and also what makes sense because you can often group things together between the landscape and the buildings in order to have those work well together.

Wong: Could you comment on the importance of the *appendix*. That's the last of the six components.

Pamela Seager: Many people do not include a very detailed appendix and rarely does it include future research topics. But I think master planning is a singular opportunity to really concentrate on your site without as many other distractions. It is unlikely in the rush of daily life that you will capture and retain ideas for future research because you are not normally as deeply involved in thinking about the future of your site or your landscape or your village. Therefore, it is very important to capture the ideas that surface for future research but which you do not have the capacity to explore during the planning process. It is really a place to make note of what still needs to be done and more fully explored.

Wong: I notice that a landscape appendix you have soil reports and irrigation systems and tree inventories.

Pamela Seager: Yes, we were far more detailed in the landscape plan than the other documents because it's a dynamic resource and you are not going to be able hold the landscape in a relative static state as you can a building. Plant materials are going to mature or to fail due to age or disease or climatic changes, plants will grow and conditions will change.

Therefore we decided to do a detailed inventory of our trees and historic plant materials so that we could anticipate rough lifespan. We wanted to look at our soil conditions here and to do a soils report so that we knew what we were dealing with. We evaluated the quality or effectiveness of the irrigation system and then we also provided a bibliography because quite a lot of the historical research in our report emanated directly from the Bixby family historic library. These are the references that Florence Bixby used to guide her in the development and management of the gardens, and unlike many other large estate gardens, this one did not have a gardening staff. The garden maintenance was directed by the owner. So she had a rather comprehensive library about different kinds of plant material and we drew on that library to look at her style of managing the garden and the information that Mrs. Bixby was using to develop and manage the garden.

Wong: You mentioned that the landscape plan is much more detailed than the buildings because the landscape is a very fluid and dynamic entity.

Pamela Pamela: Yes. We also developed that particular plan in a way that the horticultural staff could actually use it as a resource on a daily basis. For instance, if they had to replace some plant material, they could come back to the landscape plan and understand the future plan for that area of the garden. The garden staff will often ask for historic photographs so that they can identify the plant material if they have to replace it. The landscape restoration plan was really designed as a working tool, as a handbook not only for me as the administrator of the garden, but also for the horticultural staff.

Wong: Now, I notice that in the master plan for the buildings that the recommendations are very general. They are in list form or in bullet form. I wonder do you have operational manuals that go with the buildings and the projects that need to be done.

Pamela Seager: No. We do it by physical examination, critical need and availability of funding. Some projects we can accommodate within General Operating Budget but projects over \$10,000 require a dedicated funding source. For instance seismic strengthening for the ranch house was a recommendation and general guidelines were given. We knew we would probably not have all of the funding necessary at one time, so we first raised the funds to create the construction drawings and we drew those up as a phased project which could be executed with smaller increments of funding. We could

then cost estimate each component, and go after the funding. Most of the architectural recommendations require detailed drawings prior to execution and we approach them that way, although the overall guidelines help. One example is that the wallpaper in the Back Hallway is non historic and dates from the late 1960s. We have examples of the original wallpaper but I will not attempt the reproduction of the original wallpaper until I do Phase III of the seismic strengthening because for that project I will have to cut into the walls. In this way, providing it is not an emergency or safety issue, the Architecture Plan serves as a guide as to the most appropriate time to execute a project and to group it with the right cluster of other projects or recommendations to keep the work cost effective.

In terms of seismic strengthening for the ranch house, as soon as I saw availability of funding from the Los Angeles County Bond Act, we went ahead with Phase I, which was strengthening the un-reinforced masonry chimneys. Then with availability of FEMA money we were able to do Phase II, the foundations. Now we are looking for money for the final phase which is improving the connections between the first and second floors – and that is when the wallpaper project will be done.

Wong: How long was this process?

Pamela Seager: Phases I and II of the seismic strengthening of the ranch house has taken place over a period of eight years, again based on availability of funding. When we find the approximately \$600,000 required for Phase III it will take about eight months to execute.

Wong: In our discussion of long-term planning you mentioned that you have an extensive management plan that goes with the Master plan. This includes your digital database and your very comprehensive filing system for work orders.

Pamela Seager: Like most non profits we have limited resources and so management plans and management of data has to be practical. For instance, early on while we were doing master planning as we were working with the data we decided that each garden had similar components so we set up a filing system for each garden area and each had the same hierarchy. So you have very simple set of files for each garden which cover trees, hardscape, built features, artifacts, plant materials, irrigation, historic photos and research, restoration and maintenance projects. And so whenever we order something for the garden or I have paving repairs done, documentation goes straight into the hardscape file for that area of the garden. That way around I haven't spent hours entering into a database as I might never catch up if I did that. But when I need that material I can pull out the Back Patio hardscape file and I have a complete review of everything we have done related to the paving. It is a very simple system but it works. The same is true of the buildings. They have a separate set of files for the buildings and building systems and we simply drop hardcopy of work orders or documentation of work into the appropriate file.

Wong: What types of information do you have entered in your *database*?

Pamela Seager: That is a whole different database and it relates more to the archives and to ranch house, garden, and agricultural artifacts. The archive holds such material as photos, films, plans, drawings, ledgers, letters, business accounts, diaries and oral histories. Those are all in the archive which has a centralized database. For instance, if I asked the archivist to give me all references to pepper trees on the South drive, including photos, ledger entries, and remarks contained in oral interviews, maps showing the trees etc., the system would search across the database and list the references. The same is true of objects in the gardens, the house and the barn area. All of the objects are photographed and in the database with standardized accession sheet that tell you the date of the object if we know it, where it came from, a description, condition, materials, where it is currently located, etc. So you can search for the objects and the archival material very easily.

Dorothy: How long did it take to construct the database?

Pamela: It has taken about 15 years. We have an archivist who works 4 days a week. We are constantly getting new material. And what we are talking about here is thousands and thousands and thousands of objects and archival materials. For a small site, it's a huge amount of material. As a matter of fact, I got a call just this week from somebody who used to work for Fred Bixby. She said, my father just died and I opened up a trunk and I have some letters from the Bixby's to my father and would you like to have them. Well, the answer is of course, but here was more material to add to the database. We also include in the archive Construction and As-Built Drawings and Specifications Manuals for all projects executed on site, as well as irrigation drawings and garden plans. Therefore, if we need to trench into the driveway for any reason we can ask for a copy of the underground utilities drawings for that area and know what we have to work around.

Wong: How many items do you think you have at this point?

Pamela Seager: Probably about 10,000.

Wong: That's very impressive. Could you comment on your *operational manuals*? You must have operational manual dealing with personnel and also specifications for maintenance of different things.

Pamela Seager: It depends on which aspect of the site we are looking at. Obviously, we have an employee manual which gets updated every 2 to 3 years because laws change and so we make sure that we are in compliance with all of the labor codes. There is a curatorial housekeeping manual specifying how the ranch house is to be cleaned and what can and cannot be used. Because we keep livestock, we keep a daily diary of the

condition of the livestock or any treatment that has been rendered. We document all but everyday work in the gardens, such as if a tree limb fails or has to be removed it is photographed first and then a memo and the photo are put in the right file. The Curator keeps detailed treatment records for any conservation or other treatments to objects and artifacts.

We also maintain files for the buildings that are similar to the way the garden documentation is set up. Just last week the painter came in asked if he could have the whitewash formula that we want to use on the interior of the Dairy Barn. I was able to go right to the file, pull out the whitewash formula that the architect had approved for use on site. It has been my experience that a site like this with limited staff resources does not do well with a whole lot of dense written manuals. What is needed is data readily at hand to deal with a specific subject. Also in general the building and garden staff do not spend their time in an office, they are out in the field and need access to information on an as needed, practical basis. So it's far more efficient to have them know that they can come in and ask the archivist or the curator, or they can they can ask my office and say, I need an answer to this question and we can go right to our hardcopy files or our digital file and provide the answer.

Another benefit is that key curatorial or administrative staff know what is going on and can step in and suggest a different method or material if necessary.

Wong: Please describe your *long-range financial plan*.

Pamela Seager: I wish I knew, in this economy it is rather difficult to predict except to know that fundraising will be harder than ever and resources tighter. For general operating, I do a budget to begin the fiscal year but I play it out by cash flow. I always manage my budget by cash flow on a monthly basis. Each month we update the cash flow based on actual activity and then adjust our forward projections if necessary. There is no point in having an operating budget on the table if you don't have the income coming in at the right time for expenses going out the door. So we manage exclusively by cash flow throughout the year. That enables us to say, I cannot do this project now because even though it is budgeted the cash is not available at this time to support it. The same is true of construction, or anything of any magnitude, I automatically spread it out into a cash flow showing monthly income and expense.

Knowing how the costs will flow out over the course of a project enables you to fund raise more confidently because you know what money you will need and when. It also enables you to say to a funder, I see this as a two year project; therefore, I would like to apply to you for \$100,000 for each of two years, knowing that income stream will get you through your project.

Wong: I want to ask about the **strategic marketing plan** that you told me about last time.

Pamela Seager: We're just about ready to start another one.

Wong: What is a strategic marketing plan?

Pamela Seager: When the Foundation arrived, the ranch had a very low if non-existent public profile. Nobody knew who we were, what we were. It had been perceived for more than a decade as a city-run site. So we needed to develop what I would call the "brand", the imaging for the site. How we wanted to position it, what our markets were, what kinds of publicity messages did we wanted to put out there and how we were to do that. And those publicity messages emanated directly from the Interpretive or Educational Plan so that we were not making up something totally different. Based on our Interpretive Plan, our umbrella message was "Island in a Sea of Change". We were staying true to what we were telling the public in terms of the site. The Strategic Marketing Plan laid out a series of literature that needed to be developed, the essential branding image or "look" of the organization and then how we would roll that out through the media and sustain it in everything that we did. We have steadily implemented that marketing plan and now as we come to roll out the public phase of the capital campaign for the new Education Center, we are in the process of developing a new strategic marketing plan.

Wong: Could you comment on a Mission Statement. That seems to be required for all these different plans.

Pamela Seager: I find that while we have a Mission Statement, our fundamental mission is public education, to use the site and its history to explore the interaction between the people and place, culture and environment over the more than 1,500 years of continuous occupancy of the site. But we do so within a regional context. While we always adhere to the public education mandate of our mission, we amend it slightly depending upon who we are addressing. For instance if we are seeking preservation funding, the Mission Statement changes a little to look at public education by exploring the historic structures or the evolution of the landscape.

Wong: Who constructs the Mission Statement?

Pamela Seager: We developed the Mission Statement as an outgrowth of the Master Plan.

Wong: So that means you and the Board?

Pamela Seager: We did it as a team – the Master Planning Team, the staff, and the Board. But it seemed very straight forward and very natural because it was an outgrowth of the Education or Interpretative Plan.

Wong: Are the master plans for the buildings and the landscape permanent?

Pamela Seager: No. They generally last about fifteen years. In the Master Plan Document we listed all of the recommendations from the other supporting plans as a summary list. There were 167 and we have implemented all but three large ones and a couple of smaller ones. The only ones remaining are the completion of the restoration of the barnyard area and the education center, and that is under construction at this point in time; Phase 3 of the seismic strengthening for the ranch house – and that’s simply a matter of finding a source of money; and once the barns area is finished I can remove the tent in the Old Garden and undertake the restoration there. Those are the 3 major items; almost everything else is in fact completed.

Wong: Let’s go back to the major components of the master plans. The Department of Interior has a Preservation Brief # 43 on how to construct a historic resource survey report and it’s very different – the guidelines are very different in some ways to your master planning. Could you describe what points that they’re different?

Pamela Seager: We developed a document that fundamentally said from the outset that the educational component, the interpretative or the educational plan, is the critical cornerstone of what we are going to do. Therefore, everything else supports the recommendations of that educational or interpretative plan. Many of the processes like the Preservation Brief begin with the process of assuming physical restoration without first looking at the nature of what does this place have to say, and to whom, what does it mean? So while that sometimes comes out of the history, the history does not tell you what you should be saying, what the essence of the place is. Therefore, we began not from the point of view of what restoration should we be doing, but rather from the perspective of what does the place mean, what kind of planning effort does it warrant, what are the messages and what are the tools needed? And that’s where the education and interpretative sets the benchmark for an appropriate level of planning. Once you have determined an appropriate level of planning and have the major historical narratives and primary messages in place, then you can really look at the mechanics of the restoration process.

Wong: I notice that in the Brief that there’s a lack of group process in the formation of the historic resource survey. Do you want to comment on that?

Pamela Seager: Yes, I can comment from the perspective of our experience. We had a very dynamic master planning team with people coming from different disciplines – landscape, architecture, interpretative planning, master planning, etc. There were about

twelve consultants on the team plus two staff from our organization. So that immediately gave us one body of people. We then also had the Board of Trustees as another involved body. We had the Bixby family representatives as yet another body of review. And then as the master plan evolved we took findings out to different communities. For instance, we took our findings and most significant recommendations into the communities who might be affected by them, or had an interest in the future of the site. We met with people from the Convention and Visitors Bureau and people in the hospitality industry to ask them what they thought about what were proposing to say and do. Would it appeal to visitors? We took our findings to the historic community, getting together with preservationists and people running other historic sites and we asked them to comment on how the plan was emerging. However, what we did not try to do was to develop the plan by committee. We had our consultants with staff take the lead role and then we had expert readers and also segments of the public and the Board of Trustees commenting on it. Members of the Planning Team attended the meetings so the comments were discussed afterwards and we could weave them in or not as the plan evolved. But we did not at any point try to have a committee- driven planning process.

Wong: The preservation brief on the historic survey does not have evaluation of whether the plan is going well. And would you like to comment on an oversight or evaluation process the master plans are on track?

Pamela Seager: That's a difficult one because we are implementing over a long period of time. I think various forms of evaluation happen automatically. Some of them are structured and some aren't. For instance, we ask teachers for feedback about the content of the school tours and that works very well. When you are submitting grant applications, the clarity of your applications often commented on by the funding agency, so you have some evaluation there. You have got public response to changes on site and obviously the response from the Board, volunteers and staff, as well as visitors. So the evaluation comes at different levels and in different ways, certainly there are awards and honors for restoration work or for educational projects and products.

Wong: You mentioned peer review.

Pamela Seager: We find it very valuable when members of the community and particularly people who are very well regarded preservation architects, landscape architects, or educators respond to what is going on here, or call us with questions, or ask for suggestions. And that is another kind of peer review. Generally, with that kind of peer review it is easy to catch the nuances of what is being said when it's coming from somebody who is extremely knowledgeable in the field. It generally leads to a very beneficial sharing of experience, problems solved or outstanding, and I respect being able to have that type of discussion a great deal and I always learn from it.

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