

Interview with Pamela Seager, Executive Director, on
Funding Strategies at Los Rancho Alamitos (7)
Dorothy Fue Wong conducts the interview.

Wong: When is a historic site ready to apply for funding?

Pamela Seager: That's a very complex question. I think that you are only ready if you know what your medium and, hopefully, your long-range plan is and you have prioritized your funding needs.

In our case, the Master Plan laid out a series of recommendations and prioritized those recommendations so that we had a road map of how we were gradually going to restore the site and develop its educational potential. Therefore, we did not seek funding for something if we knew that ideally the project was best undertaken at a future time that was a number of years away. Because of the Master Plan and its detailed recommendations and priorities, we were able to know when it was the right time for specific work to be done.

The timing for the fund-raising then falls naturally into place because you have a step-by-step plan in terms of where you are going. I think it is not very wise to have a "shot gun" approach to projects. Very often people will become aware of available funding for a certain type of work, and they will come up with a project to fit the funding that is available, even though it may not be the best time to undertake the work. I do not think that is the best approach, and I do not think it is a very responsible or thoughtful approach to using the funder's money. Whether you are undertaking the development of an educational or a preservation project, you need enough of a scope of work to accurately estimate the funding that will be required.

That means that you will need some up front funding to develop at least Schematic Drawings. You also need a good sense of your timetable for execution because obviously pricing is only good for a certain amount of time, so if the execution is more than 90 days out, it is wise to add an appropriate inflation factor.

It is also important to understand that sometimes it takes a long time from conceiving a need, to funding it, and then being in a position to execute the work. Therefore the institutional readiness needs to cover planning the project and raising the money for at least schematic drawings. It is also important to remember that many funding sources have at least a six month, sometimes a year of review and response time. So that has to be built into the equation also.

Wong: Could you give us an example of a schematic design?

Pamela: Taking the example of a restoration project, you start with a **Conceptual Design Phase** which tells you how the project will be approached. You then move to the **Schematic Design phase**, which fleshes out the project enough to provide a good road map for the next phase of the project development, which is **Design Development** and really start to develop the details. You can normally get an initial idea of costs from Schematic Design drawings but it is the completion of the third component, the Design

Development drawings, that allows you to obtain reasonably reliable estimates from which you can set a fundraising goal. The fourth phase of work is the development of the **formal Construction Drawings and Specifications** that you will need to submit to the jurisdiction's Building Department for plan check approvals and the permits that are necessary to actually build the project. Depending upon the complexity of the project and the scope of work, sometimes it can take two to four three years to move from Conceptual Design through to project approvals. But obviously you have got to have raised the initial money for the Schematic Design drawings to be prepared in order to start the process.

Wong: As an example, let's go to your current project which is the barns area restoration and the construction of an Education Center. Could you describe the process that you went through in getting the funding for that?

Pamela: The funding is incremental and in this instance the project is incremental. We developed a phased project because we didn't think we would raise the money to implement the entire project at one time. We also thought it would be wise to do some initial access improvements as early, smaller components of work but which would facilitate the large vehicle access that would be needed for the subsequent phases of the construction.

At this point we have completed Phases I and II, and we are in the process of Phase III. Overall it is a \$14.5 million project that includes not only the physical work and the relocation and the restoration of the historic buildings, but in our case it also includes the development for the interior educational mediums, film, exhibits, murals, orientation panels, signage etc. It is these educational components which constitute the educational presentation and interpretation of the site and which are fundamentally the reason for the whole project.

The restoration of the barns area and the construction of the Education Center in particular, provide for the first time the interior meeting and programming spaces and the mediums by which to tell the full story of the Rancho. The site has more than 1500 years of continuous occupation by many cultures and people and yet the physical evidence today reflects largely the period of the late 19th century through to the mid 20th century. The interpretive mediums in the Education Center allow us to tell the entire span of the story from the earliest Tongva people, and also to include not just the perspectives of the various owners, but also those of the tenant farmers and immigrant ranch workers, and to set that story within its regional and environmental context.

We are currently in Phase III of the project, which is the relocation and restoration of the historic barns, which have to be relocated to make room for the Education Center. None of the structures are in their historic locations but the traditional grid pattern will be restored. This current phase of work includes relocating the agricultural buildings, complete restoration, seismic strengthening and safety improvements and restoration of the rugged, working ranch landscape. The final phase of work will be the construction of the Education Center which is an adaptation of, and an extension to, an historic building. That will be the last phase of work and completes the project.

By executing the project in phases, if you find your funding is not on target you can pause before moving into the next phase of work. So there is an advantage to phasing a project, if that approach will work to your advantage. It has worked very well for us. The other way it has been helpful for us is that we had a large state grant for the restoration component that we are currently executing and the granting agency requires us to maintain a separate accounting system, as well as a separate checking account. Therefore, separating out that phase of work out from the rest of the project simplifies the project administration and accounting that is required. One of my recommendations would be to look at whether or not phasing a project makes good sense.

Wong: On this project, how long did it take you and your staff to formulate at the very beginning, the criteria?

Pamela Seager: The criteria were really laid down with the **Master Plan**. We already knew from the Master Plan what the future institutional and restoration site needs were and therefore what we wanted to do with the barnyard area, which was based on the educational or interpretive plan. Then right after completing the Master Plan it was a case of whether the institution was ready to raise the money and execute the Master Plan recommendations.

We next commissioned a **Funding Feasibility Study** which told us that we had a lot of work to do before we could raise the necessary funding. Over a twenty year period we steadily executed the recommendations of the Funding Feasibility Study and a number of other institution-building studies, and now all but four of the one hundred and sixty seven recommendations of the Master Plan have been completed, leaving the largest component, the Barns Area Restoration and Education Center component to the end. In that way we developed a track record of successful projects, which was important to funders. And the Board made a sensible decision in setting forth a phased approach because we were a fledgling institution when we started with just three people on staff. Moving through a phased approach gave us the time to get more and more experience with the site and to evolve the institution before we took on the largest project of the Master Plan recommendations.

So it's a carefully modulated process. But people need to be aware of the fact that from the time you say I want to do this project, to when you actually put a shovel in the ground, is often a number of years.

Wong: During this whole process you mentioned that you were looking for funding to complete this project. How did you go about finding some funding sources?

Wong: It was several-pronged approach because we divided the project into phases. For the first phase I was able to execute that component with a mix of county bond act monies and also private monies because we had started the capital campaign, so we were already in the major gift phase of the capital campaign. The Board of Trustees pioneered the efforts for significant private gifts and they were very successful but an important part of that success was being able to clearly articulate the **public benefit** of the project. The staff normally takes the lead on seeking public funds. We identify an agency or funding

source and then we begin the process of looking at whether or not we can put an appropriate proposal before that agency and what the impacts are, do we need to do donor cultivation and what form should it take?

The current phase of work is a mixture of state and private money on a one-to-one match basis and it is about \$3.5 million in direct construction costs, excluding professional fees and other construction-related costs. And the next phase of work, the Education Center is about \$6 million in direct construction costs and that will be funded almost exclusively by private monies from individuals, corporations and both public and privately held foundations

Wong: Do you have a special staff person or consultant who helps you with obtaining funding sources from private individuals and organizations?

Pamela Seager: I do not have a staff person. I do the grant proposals myself. Unfortunately we cannot afford a staff Development Director. All of our resources are directed to program, that is educational services for the public. I do have an experienced capital campaign consultant, working primarily in the South Bay area. The Board is also very experienced in fundraising and directs that effort in the greater Los Angeles area with support from the consultant and myself, and I work on the public funding. We operate on a pretty slim development budget.

Wong: What do funding sources look for?

Pamela Seager: It depends on upon the sources you are going to. But I think the strategies are very different if you are going to an individual versus a foundation, or a public agency. It is very, very important to look at what the goals and initiatives of the funders are, to make sure that you and your project fit within those guidelines, and that there is a good match between the agencies. There is no point in applying to an agency if what you are proposing is outside their realm of interest.

So, thorough, basic research is essential. You have to look at whether or not your project and the audience you serve fits with the initiatives of that particular organization and/or foundation. It is also important to stay up to date because foundation and donor priorities sometimes change, which is certainly true at the present time. In the case of individual donors, at least an initial gift is usually based on personal relationships and a personal interest in what you are doing. Very often people are interested in funding your project because it benefits a larger community or improves people's quality of life. I have found that very rarely does individual give to the actual project, they are giving to the people that your project will benefit.

People forget that the ultimate beneficiary of what they are doing is the general public, or in the case of the Garden cities, it might be the residents plus the general public. But it's very, very important to remember the end result of a project and not to be carried away by the process itself. It has to be always presented and executed from the perspective of the service or benefit that your project will bring to a larger community.

Wong: We discussed previously about the cost of a public benefit. With Rancho Los Alamitos, what are your public benefits?

Pamela Seager: At the top of the list I would say the fact that we are a superb cultural and educational resource that remains, certainly in Long Beach, one of only two public cultural resources, and that includes museums, that remains free of charge to the public. We also offer all of our school tours, our children's cultural workshops, and general admission free of charge.

We had an event, the opening of the restored Native Garden two weeks ago. Over 1,000 people attended and learned a lot about the native landscape and using native plant materials with some superb speakers, demonstrations and activities, and it was free of charge. In addition, the fundamental value of green open space in an urban environment is important. People often come and they just want to sit in the garden and relax because it is time-out from a dense urban rushed life. If that's what people want, that is fine. You do not have to take a tour, you do not have to do anything. If you just want to sit down in the garden and listen to the birds or think about life, that is fine too and it is a valuable public service.

The ranch is also used as a teaching tool for students in architectural preservation and landscape architecture courses. Garden Clubs like to meet here and use the gardens to explore the history of landscape design or the use of plant materials. There are many different educational communities that use the history and environment of the ranch on many levels that reach far beyond the locality of the site. But it all emanated from the Master Plan and looking at the educational potential of the site and how it could be used to explore the relationship between people and place, culture and environment, over time.

Wong: I wanted to add that this site has national impact. Would you like to comment on that?

Pamela Seager: Yes. We have done a lot of work on thoughtful landscape restoration and interpretation. We have tried hard in every way to always reach for the highest possible standards, both ethically and the way in which we handle the historic resource. We strongly believe that you should not put your hallmark on a historical resource. It is important for you to step back, to understand the resource, and to have the humility to let the resource to speak to you rather than defining the path that you want to go down without considering what the resource has to tell you first. And I think it is enormously important not to lose that sense of humility and respect for the resource, as it stands, and to accept all of its promise as well as its problems. You just have to figure out how to unfold and develop its potential as a meaningful and relevant historical and cultural resource.

Wong: You have many people from across the United States coming to your site. Is that correct?

Pamela Seager: Yes, we do. For the visitor who travels more than thirty miles to visit the site, I would say that the primary draw is the significance of the gardens. However, it is also one of the few places in Southern California that represents more than 1,500 years

of continuous occupation. We also have such a rich archive of primary source material that you can draw upon any aspect of Southern California's history and there will be a counterpoint here in the lives of the people who were there at that point in time. In this economic climate I think historically and today, the ranch demonstrates the quality of resilience. It has survived and adapted to 1,500 years of change and it is still here, is evolving, and is still strong and relevant. And that's a wonderful thing to think about when everybody's struggling in a difficult economy and really worried about outcomes. Yes, we all worry, but somehow or another we struggle through and times like this remind us of the resilience that humanity has.

Wong: Are there funding projects that you are particularly proud of?

Pamela Seager: Well, I am always so proud of our funders. We have been fortunate to have wonderful donors who have taken risks with us. We were a small organization and relatively unknown so I have enormous respect for our early donors who believed in what we could achieve. I underscore to my staff that they have to be very mindful of the fact that they are responsible for spending other people's discretionary money. You have an enormous responsibility to spend that money prudently, to make sure that the outcome is of high quality, and that the donor can be proud of the outcome and of being associated with the project and the institution.

I believe that is a valuable concept to bear in mind to guide the work ethic. One of the projects that was a benchmark project for us early on was that we received one of the first large grants that the State Office of Historic Preservation awarded for landscape restoration. It was a new direction because they had largely awarded grants for building preservation. It was 1996 and at that point in time there was not a whole lot of serious restoration of 20th century landscapes being undertaken. At that time, if you went to a State Preservation Conference you did not see many symposia devoted to the importance of preserving cultural landscapes. So it was very brave of the State to give us, I think it was \$453,000, to do the restoration of the South Gardens which were designed by Florence Yoch and the Olmsted Brothers Firm. I remain proud of that and proud of the State for having had confidence in us.

Wong: That sounds wonderful. Is there any other memorable funding achievement?

Pamela Seager: I am quite proud of the fact that we received a grant for \$1.5 million from the California Cultural Historical Endowment. It was a very competitive statewide, and intricate process, and we had to do an oral defense of our project in Sacramento. But we scored well and we were successful in getting most of what we asked for, but the success is due in part to the in-depth planning process and, ultimately, the quality of the resource.

I think the challenges for the Garden Cities will be very different and are rather complex. On the one hand there are California initiatives like the Mills Act which provides tax credits for preservation projects. However, for most other fundraising, it will be necessary for the Garden Cities to develop partnerships with appropriate 501 (c) (3) non profit partners in order to take advantage of the tax deductibility required by almost all

donors and certainly by all foundations. I would think that local preservation groups, historical societies and other landscape restoration programs or perhaps even university foundations would be good candidates to explore.

Wong: Thank you very much, Pamela.

June 23, 2009

© 2009 by Pamela Seager and the Rancho Los Alamitos Foundation
Fellowship project for Cornell University's Clarence Stein Institute