

## II.1 Introduction

(See Section 1 of the current Nomination Form and Section 1, 2 and 3 of the original Nomination Forms)

1a) State Party:  
USA

1b) Name of World Heritage property:  
Monticello and Univ of Virginia in Charlottesville

1c) Please provide geographical coordinates for the site to the nearest second. (In the case of large sites, please give three sets of geographical coordinates.)

Geographical coordinate: NW 17 723190 4210890

Geographical coordinate: NE 17 727710 4210520

Geographical coordinate: SE 17 726040 4206690

Geographical coordinate: SW 17 722830 4209540

1d) Give date of inscription on the World Heritage List.

date (dd/mm/yyyy): 11/12/1987

1e) Give date of subsequent extension(s), if any.

1f) List organization(s) responsible for the preparation of this site report.

### Organization #1

Organization Name: Monticello  
Last Name: Jordan  
First Name: Dan  
Title: President  
Address: Monticello, P.O. Box 316  
City: Charlottesville  
State/Prov: VA  
Postal Code: 22901  
Telephone: (434)984-9801  
Fax: (434)977-7757  
Email: djordan@monticello.org

Organization #2

Organization Name: University of Virginia  
Last Name: Towns  
First Name: Anna  
Title: Interim Curator for the Academical Village  
Address: 575 Alderman Road  
City: Charlottesville  
State/Prov: VA  
Postal Code: 22903  
Telephone: (434)243-8590  
Fax: (434)982-5049  
Email: towns@virginia.edu

## **II.2 Statement of Significance (see Section 2 of the current Nomination Form and Section 5 of the original Form)**

*2a) When a State Party nominates a property for inscription on the World Heritage List, it describes the heritage values of the property which it believes justifies the inscription of the property on the World Heritage List. Please summarize the justification for inscription as it appears in the original nomination of the property.*

The Thomas Jefferson Thematic Nomination, consisting of Monticello and the Jeffersonian Precinct (synonomously referred to as the Academical Village) of the University of Virginia, is proposed for inscription on the World Heritage list under three criteria: (I) as a unique artistic achievement, a masterpiece of creative genius; (IV) as an outstanding example of a type of a building or architectural ensemble which illustrates a significant stage in history; and (VI) because Monticello and the University of Virginia are directly and tangibly associated with ideas, beliefs, and events of outstanding universal significance.

### Summary

Of all Jefferson's architectural creations, Monticello and his original plans for the University of Virginia best represent the fullness of his architectural genius. Each is a telling example of his views on neoclassicism, his ideal of a Roman villa in a pastoral setting, and the need to reconcile architectural form with utility. Both properties commanded the attention of the international community. Impressions of them have been recorded in numerous publications during and after Jefferson's lifetime.

Although located far from the sophisticated cities of Europe or those of the Eastern seaboard of America, Monticello and the University of Virginia represent Jefferson's efforts to produce architecture that would rise above the provincialism of most American buildings, win the respect and admiration of the world, and serve as models for the edification of future architects. With these buildings, he succeeded in producing architectural landmarks that not only won the praise of scholars and observers but also are celebrated by the architectural profession as among the country's proudest architectural achievements.

Charlottesville, Virginia, is the location for both properties. The hill overlooking Jefferson's boyhood home at Shadwell and the town served as the location for Jefferson's house. When the University of Virginia was planned by Jefferson, he arranged for it to be located in Charlottesville, close to his home, which he viewed as a healthier location than the older Tidewater area. The proximity of the University of Virginia to Monticello also allowed him to oversee, in minute detail, its construction according to his designs. He was, therefore, able to impress upon the University the full force of his principles and taste, as he was with Monticello. This level of involvement was not equalled in his other major public buildings projects or major residences in Virginia, with the exception of his small retreat, Poplar Forest.

The relationship and interdependence of the two properties is recorded by Philip Alexander Bruce, who in his *History of the University of Virginia* (1920) wrote:

“Not since the completion of Monticello had he possessed such an opportunity to show his extraordinary aptitude for architecture, without being trammelled by others. In his designs for the Capitol at Richmond, and public edifices in Washington and private residences in Virginia, there was always someone with the power to modify or push aside his recommendations. In this new field, he was quite as unhampered as he was in constructing his own house.”

Monticello and the University of Virginia are also two Jefferson properties which retain a high level of structural and artistic integrity. They fully convey an authentic picture of Jefferson's original concepts, unlike properties such as the State Capitol of Virginia, which lacks the same level of involvement by Jefferson and which has been much altered from its original design. The high level of integrity for the two properties is remarkable considering the lack of scholarly curatorship of Monticello before 1923 and the continuous use of the University of Virginia for academic purposes since 1825. Although Monticello receives more than half a million visitors each year, and the University's Rotunda suffered a major fire in 1895, both retain their essential Jeffersonian form such that they serve as destinations for architectural pilgrimages undertaken by visitors from around the world.

*2b) At the time of initial inscription of a property on the World Heritage List, the World Heritage Committee indicates the property's outstanding universal value(s) (or World Heritage value(s)) by agreeing on the criteria for which the property deserves to be included on the World Heritage List. Please consult the report of the World Heritage Committee meeting when the property was listed and indicate the criteria for which the Committee inscribed the property on the World Heritage List. (Choose one or more boxes.)*

Cultural Criteria

- i
- ii
- iii
- iv
- v
- vi

Natural Criteria

- i
- ii
- iii
- iv

*2c) At the time of initial inscription, did the World Heritage Committee agree upon a Statement of Significance for the WHS? (Consult the report or minutes of the World Heritage Committee meeting when the property was listed.*

NO

2c1) If YES, please cite it here.

2c2) If NO please propose a Statement of Significance for the World Heritage Site based on the consideration given the property by the Committee when it inscribed the property on the World Heritage List. (Note: Following the completion of the Periodic Report exercise, the State Party, in consultation with appropriate authorities, will determine whether to proceed with seeking a Committee decision to approve any proposed Statement of Significance. The Committee must approve any proposed Statement of Significance through a separate, formal process. See 7g.)

CRITERION I: A unique artistic achievement, a masterpiece of creative genius.

Monticello

The first design for Monticello, completed about 1769, resulted in a building that reflected Jefferson's ideas about architecture derived from books. The reflection in the house of the creator's genius was an aspect of its uniqueness.

Completed in 1809, the second Monticello embraced Jefferson's first hand studies of architecture in Europe and his adaptation of this knowledge to the requirements of living. In 1796, as the remodeling of the house was taking shape, Monticello was visited by the French exile Duc de la Rochefoucauld-Liancourt who viewed the new design as fully comparable with like houses in Europe.

University of Virginia: Jeffersonian Precinct

The University of Virginia has drawn praise for its sheer beauty and for its representation as a unique adaptation of a Roman villa form to a community of scholars.

The original section of the University of Virginia was completed in 1825, just a year before Thomas Jefferson's death. Therefore, unlike Monticello, the ensemble did not attract as many notable visitors on their way to see both the man and his architectural creation. Rather, the complex generally has been cited by late nineteenth century and twentieth century observers as tangible display of Jefferson's architectural genius.

CRITERION IV: An outstanding example of a building or architectural ensemble which illustrates a significant stage in history.

Thomas Jefferson's architecture was part of a movement in Europe that adapted the forms and details of classical architecture to contemporary buildings. Neoclassicism was a movement that attracted the intellectual elite of Europe which studied literature, philosophy, and languages of antiquity. The neoclassical era in Europe covers a major portion of the eighteenth century, from the 1730s to the end of the century.

Jefferson joined in this revivalist spirit as no other American did before him. Monticello and the University of Virginia are two outstanding architectural compositions that are part of the international neoclassical movement. They represent the two approaches Jefferson made toward neoclassicism, from a looser adaptation with Monticello to a stricter interpretation with the University of Virginia. Both manifested a combination of ideas from a variety of sources adapted to be uniquely Jeffersonian.

As created by Jefferson, life at Monticello was similar to that of Roman villa life where the ruling families lived in luxurious mansions and partook of the intellectual and physical pleasures of the bucolic grounds. However, Monticello's floor plan was more informal than that of the typical Roman villa or neoclassical structure. In designing his house, Jefferson was as motivated to recreate a neoclassical monument as he was to provide for convenience of living. The house as completed represents his reconciliation of convenience with classical forms.

The pastoral ideal underscored by Monticello was also exemplified by the academical village of the University of Virginia where students and professors were removed from the decadence of urban life. It resembles more closely a Roman villa than any other type of architecture, with a loose connection of porticos and buildings spread out on open country.

The supreme qualities of the University of Virginia were cited by historians. The foremost scholar of Jefferson's architecture, Fiske Kimball, wrote:

"Its separate housing of departments, its independent library building, its covered connecting passages, as well as its monumental plan, were new in an American university, and, in their combination, almost entirely novel abroad."

CRITERION VI: Directly and tangibly associated with ideas, beliefs, and events of outstanding universal significance.

Thomas Jefferson's architecture grew out of his lifelong involvement with ancient languages, literature, history, and philosophy. His architecture reflected his high regard for the classical civilizations of Rome and Greece and was part of the classical trend that swept through Europe in the eighteenth century. To him, the neoclassical movement was more than a trend. It offered lessons for the ages.

Jefferson's taste in architecture far transcended notions about beauty or style. It also serves as a compelling expression of his hopes for the new nation--that it would be noble and free from the traditions of the Old World; that it would offer infinite possibilities to the common man; and, that it would serve as a beacon for freedom and self-determination for the world. As much as the Declaration of Independence and Jefferson's other political and literary works, his architecture is symbolic of his universal hopes for the new nation and for the world's humanity.

*2d) Since the original inscription of the property on the World Heritage List, has the World Heritage Committee agreed with a proposal by the State Party that the property be recognized for additional World Heritage values and added additional criteria to the inscription as a result of a re-nomination and/or extension of the property?*

NO

*2d1) If YES, please indicate which new criteria were added and the date.  
(dd/mm/yyyy)*

**II.3 Statement of Authenticity / Integrity**  
**(See Section 2 of the current Nomination Form and Section 4 of the original Form)**

*3a) In addition to meeting one or more of the criteria, which justify inscription on the World Heritage List, a natural or cultural property must meet the appropriate conditions of authenticity and/or integrity, as defined in clauses 24b and 44b of the Operational Guidelines for Implementing the World Heritage Convention. If at the time of inscribing the property on the World Heritage list, the State Party and the International Council on Monuments and Sites, ICOMOS and/or the International Union for Conservation of Nature and Natural Resources, IUCN, evaluated the authenticity and integrity of the property, please cite those evaluations here. (Please quote directly from the nomination, Committee minutes and the Advisory Body's evaluation.)*

According to the nomination, "today, with the exception of occasional moisture problems, Monticello is structurally sound and in excellent condition. The property withstands a large visitation. On an annual basis, more than half a million people visit the property and walk through the rooms on the first floor. The level of visitation makes heavy demands on the property, necessitating a continuous effort to monitor its condition and make repairs as necessary."

And, for the Jeffersonian precinct at the University of Virginia the nomination stated the following: "beginning in the late 1970s, the University's awareness of accelerating decline within the Jeffersonian Precinct prompted urgent requests for financial assistance from the General Assembly [State legislature] of the Commonwealth of Virginia. In 1982, special deferred maintenance funding, earmarked for the Jeffersonian Precinct, was forthcoming, signaling a similar understanding by the state government. Subsequent university actions establishing a special board to address matters of fund-raising and curatorship and creating within the university an architectural/curatorial post to handle preservation and restoration work on the site have served to establish a comprehensive preservation/restoration program. The result of these events has been a rapid increase in activity at the site. By the end of 1987, all roofs will be watertight. Attendant restoration of wood roof and cornice members, where necessary, will also be completed. By July 1986, extensive restoration work had been carried out at two of the ten pavilions, Pavilions III and VIII. Limited work had been conducted at five others. In all cases, the work has resulted from the need to keep the buildings in constant use, major repairs to pavilions being feasible only every decade, as occupants change. Where more extensive efforts have been mounted, sufficient research has been done to allow for well-documented restorations."

The nomination continues: "in the summer of 1986, the National Endowment for the Arts awarded the University \$30,000 [USD] toward the preparation of an historic structures report. It is anticipated that from four to five years will be required to prepare an exhaustive survey and analysis. In the meantime, restoration work and research will be carried out simultaneously on a project by project basis."

*3b) Have there been significant changes in the authenticity or integrity of the property since inscription?*

YES



*3b1) If YES, please describe the changes to the authenticity or integrity and name the main causes.*

See the attached Restoration Chronology for Monticello, which is the full document spanning the years 1923-present. For the Academical Village see Murray Howards attached document detailing restoration work done from 1984-2002.

## II.4 Management

(See Section 4 of the current Nomination Form and Section 2 and 4 of the original Form)

### *Management Regime*

4a) How can the ownership/management of the property best be described? (Select all that apply.)

- management under protective legislation
- management under contractual agreement(s) between State Party and a third party
- management under traditional protective measures
- other

*Please describe.*

(See response to 4b, below.)

4b) Please indicate under which level of authority the property is managed

Other

*Please describe*

Monticello is owned by the Thomas Jefferson Foundation, Inc., a private, non-profit organization, and administered as a national memorial and museum to keep alive the name and memory of Thomas Jefferson. The Foundation's board of trustees consists of sixteen members.

The University of Virginia and the Commonwealth of Virginia, as owners of the Jeffersonian Precinct, are the principal agents with regard to the administration of the site. They are advised on a routine basis by the Virginia Division of Historic Landmarks and the Virginia Art and Architectural Review Board. Within the University, the property is controlled by the Board of Visitors. Preservation matters are addressed by the Curator and Architect for the Academical Village, the Architect for the University, the Department of Facilities Management, and the School of Architecture.

4c) Please describe the legal status of the property. For example, is it a national, provincial or territorial park? A national or provincial historic site?

Monticello (private ownership) and the University of Virginia (public ownership) have been designated National Historic Landmarks.

4d) Please provide the full name, address and phone/fax/e-mail of the agency(ies) directly responsible for the management of the property.

Contact #1

Agency Name: Thomas Jefferson Foundation  
First Name: Dan  
Last Name: Jordan  
Address: Monticello, P.O. Box 316  
City: Charlottesville  
State/Prov: VA  
Postal Code: 22901  
Telephone: (434)984-9801  
Fax: (434)977-7757  
Email: djordan@monticello.org

Contact #2

Agency Name: Commonwealth of Virginia c/o President University of Virginia  
First Name: Anna  
Last Name: Towns  
Address: 575 Alderman Road  
City: Charlottesville  
State/Prov: VA  
Postal Code: 22903  
Telephone: (434)982-5829  
Fax: (434)982-5049  
Email: towns@virginia.edu

4e) Please provide a list of key laws and regulations, which govern the protection and management of the cultural and natural resources of the property.

University of Virginia:

National:

As a designated National Historic Landmark district, all proposed projects are reviewed under Section 106 of the Historic Preservation Act of 1966 whenever the University undertakes projects funded by federal grants or requiring permits from federal agencies, a situation that rarely affects any of the University's historic properties. In reviewing plans submitted by the University of Virginia, The Virginia Department of Historic Resources applies the Secretary of the Interior's Standards and Guidelines for the Treatment of Historic Structures and Landscapes.

State:

2.1-488.4B of the Code of Virginia provides that no building or appurtenant structure shall be removed from state-owned property unless approved by the Governor upon the advice of the Art and Architectural Review Board. The Governor further conditions approval upon the recommendation of the Council on the Environment, the Division of Historic Landmarks of the Department of Conservation and Historic Resources and the Department of General Services.

The specific provisions for review of rehabilitation and restoration projects are defined in the Budget Bill Section 4-4.01(s), 2000 Virginia Acts of Assembly, Chapter 1073: To guarantee that the historical and/or architectural integrity of any state-owned properties listed on the Virginia Landmarks Register and the knowledge to be gained from archaeological sites will not be adversely affected because of inappropriate changes, the heads of those agencies in charge of such properties are directed to submit all plans for significant alterations, remodeling, redecoration, restoration or repairs that may basically alter the appearance of the structure, landscaping, or demolition to the Department of Historic Resources. Such plans shall be reviewed within thirty days and the comments of that department shall be submitted to the Governor through the Department of General Services for use in making a final determination.

#### Local

As a state agency, The University of Virginia is exempt from compliance with local codes and ordinances.

#### Monticello:

Because Monticello is privately owned, federal and state preservation laws do not apply (except when federal or state funds or permits are involved). However, the Thomas Jefferson Foundation has a strong working relationship with the Virginia Department of Historic Resources.

*4f) Please describe the administrative and management arrangements that are in place for the property concerned, making special mention of the institutions and organizations that have management authority over the property and the arrangements that are in place for any necessary coordination of their actions. Make special reference, if appropriate, to the role of First Nations in managing the property.*

#### University of Virginia: Jeffersonian Precinct

All construction, demolition, and major renovation projects at the University are reviewed by the Virginia Department of Historic Resources (VDHR) as part of a mandated Environmental Impact Statement. Buildings listed on the National Register of Historic Places, and buildings fifty years old and older, fall under VDHR's evaluation purview. The comments of VDHR are submitted, as well, to the Virginia State Art and Architecture Review Board (AARB) as part of that body's review of all design at the University.

Work in the Academical Village has been overseen by the Curator and Architect for the Academical Village for the past twenty years, in consultation with the Virginia Department of Historic Resources. The Curator position is currently vacant and is due to be incorporated into the Office of the Architect for the University, in a re-organization plan that will take effect in the second half of 2003. To fill that gap and add to the professional oversight process, the University plans to convene a steering committee to provide peer review and guidance to staff and consultants that are producing the Historic Preservation Master Plan. The Architect for the University will chair the project committee, overseeing the selection of the Historic Preservation Consultant Team, reviewing the progress and product of the project, and establishing goals and guidelines for the project.

#### Monticello:

The restoration department, formally established in 1988, is staffed by a director and an architectural conservator. Following the reorganization of the Foundation in 1994, the director began reporting to the Curator rather than the Executive Director (whose title was changed to President).

In 1996, a restoration committee was established with the "mandate" from the President to prepare a restoration master plan for Monticello (house, plantation, and grounds); to identify issues to be resolved, with recommendations to the President; and to provide communication and coordination for ongoing projects. Members of the committee are the Curator and the directors of Archaeology, Buildings, Gardens and Grounds, Research, Restoration, and the International Center for Jefferson Studies. The Director of Restoration serves as chairman. All requests for restoration-related projects are submitted first to the Director of Restoration who determines if a review by the committee is required. No action by the committee is needed, for example, for conservation and other work that does not raise major issues of interpretation. Nor does the committee have oversight of the execution (construction) phase. This is coordinated by the Director of Restoration through a process of close consultation with all those involved. Specific procedures are described in the document, "restoration at Monticello, Mission, means principles, policy, procedures" (draft 9/10/1996).

Although Restoration is the smallest of the Foundation's departments, its strength has been the close working relationship that it has cultivated over the years with no less than five other departments: Curatorial Research, Archaeology, Buildings, and Gardens and Grounds. Nevertheless, there are limits to what can be accomplished in a timely way given a staff of only two people. One concern has been the growing frequency of diverting Buildings Department personnel from work on the historic structures in order to maintain the Foundation's many support facilities. The fact is that the Foundation has not kept ahead of the deterioration of the fabric of its most important resource--the mansion itself. This is particularly evident on the exterior of the house and has prompted comments from visitors about peeling paint, rotting wood, and failing mortar joints. The Restoration Department's charge to oversee preservation of the historic structures, while at the same time sustain a program of restoring (recreating) missing features of both Jefferson's house and landscape is, quite frankly, a daunting task. For this reason the department requested that a Restoration Specialist be added to the staff. In October, 1996 this was partially answered by dedicating one person within the Buildings Department to work with the architectural conservator to insure that Monticello's primary resource is given the sustained professional attention it deserves. Nevertheless this person still reports not to the Director of Restoration but

the Director of Buildings. It is only because the spirit of cooperation is firmly held by those involved that the fractured administrative arrangement works so well.

*4g) Please also note whether there have been any significant changes in the ownership, legal status, contractual or traditional protective measures, or management regime for the World Heritage Site since the time of inscription.*

No

*4h) Is there a management plan for the property?*

YES

*4h1) If YES, please summarize the plan, indicating if the plan is being implemented and since when, and the URL where the plan can be located, if available. (A copy of the plan should be submitted in December 2004. See Section 8)*

Monticello has a detailed 213-page management plan, with rolling three-year financial projections. In addition, a Historic Structures Report was completed in 1987. The University of Virginia completed a Historic Structures report in 1987, but does not yet have a formal management plan. See below.

*4h2) If NO, is a management plan under preparation or is preparation of such a plan foreseen for the future?*

University of Virginia:

A Historic Preservation Master Plan will be commissioned in September 2003. The Master Plan will define and guide a University preservation stewardship ethic which will extend beyond the boundary of the Academical Village, as development pressures result in new construction adjacent to and around existing historic properties. As a first step toward the completion of a Historic Preservation Master Plan, the University has conducted a grant-funded research project to document the evolution of the built and natural environment of the University Grounds from 1817 through the present. Over the past six summers, an interdisciplinary team of graduate students from the School of Architecture has worked under the direction of a University Landscape Architect to trace the development of land use, roads, topography, water, and vegetation in addition to buildings, using primary source material from the University's Special Collections Library. The project, which will be completed in the summer of 2003, has produced a narrative history that identifies historic periods and themes that will form the basis of the Historic Preservation Master Plan Site History work.

The Historic Preservation Master Plan will provide an important collection of foundation analysis and documentation in support of the University of Virginia's historic preservation values and priorities. The University will use the analysis and documentation of the Historic Preservation Master Plan as a crucial piece of overall strategic master planning, continuing to develop a model preservation program across the entire site that is founded on the principle that the historic buildings will be intensively used, will grow, and will evolve.

## *Financial Resources*

*4i) What is the annual operating budget for the property in the current fiscal year? (For sites consisting of more than one property provide the budgets of constituent parts.)*

Monticello: \$15, 871,000 USD. 36% from Museum Shops and Catalog Sales, 34% from Admissions, 14% from Gifts and Grants, 12% from Investment Return, and 4% from other sources.

University of Virginia: Jeffersonian Precinct-- In process of collecting data.

## *Sources of Expertise and Training in Conservation and Management Techniques*

*4k) Please describe any sources of specialized expertise, training, and services that come from sources off-site (e.g., training centers, museum conservation facilities).*

Monticello and the University routinely send staff off-site for specialized training. Except in lean years, the restoration budget has provided funds for the architectural conservator to attend a course, usually lasting one week, on some technical aspect of conservation and restoration. These courses have been sponsored by organizations such as the Association for Preservation Technology, Virginia Conservation Association, the Smithsonian, Winterthur, and private concerns.

University of Virginia: Jeffersonian Precinct Historic Preservation Consultant Team:

Richard Guy Wilson  
Commonwealth Professor of Architectural History  
The University of Virginia  
Charlottesville, Virginia

Calder Loth  
Senior Architectural Historian  
Virginia Department of Historic Resources  
Richmond, Virginia

Hugh Miller  
Chief Historical Architect  
National Park Service  
Director (retired)  
Virginia Department of Historic Resources  
Adjunct Professor (retired)  
Goucher College, Maryland

William Beiswanger  
The Robert H. Smith Director of Restoration  
The Thomas Jefferson Memorial Foundation, Inc.  
Monticello, Charlottesville, Virginia

Mark R. Wenger  
Architectural Historian, Architectural Research Department  
Colonial Williamsburg Foundation  
Williamsburg, Virginia

Travis McDonald  
Director of Architectural Restoration  
Thomas Jefferson's Poplar Forest  
Lynchburg, Virginia

4j) *Please provide information about the number of staff working at the World Heritage Site (enter figures).*

Full Time: 140 (Value must be a number)  
Part Time: 11 (Value must be a number)  
Seasonal: 62 (Value must be a number)  
Other: (Value must be a number)

*Please list the job categories of these staff (e.g., Park Superintendent, Historian, Ecologist, Interpreter, General Works/Maintenance Manager) and describe the specialized skills and expertise of the World Heritage Site's staff members.*

Monticello has scores of job categories. Its staff includes 15 Ph.D.'s. Most supervisors have advanced degrees in their fields. Dan Jordan, PhD in American History, University of Virginia; Fraser Neiman, PhD in Anthropology, Yale University; Gabriele Rausse, PhD in Agricultural Sciences, University of Milan; Dianne Swann-Wright, PhD in American History, University of Virginia; Sara Bon-Harper, PhD in Anthropology, University North Carolina; Jeff Looney, PhD in History, Princeton University; Elizabeth Chew, PhD in Art History, University North Carolina; Liz Tedwell, PhD in Higher Education Administration and Communication, Michigan State; Jill Anderson, PhD in American History, Rutgers University; Robert Haggard, PhD in Modern European History, University of Virginia; Julie Lautenschlager, PhD in American Studies, College of William and Mary; Elizabeth-Latta Brogher, PhD English Literature, Indiana University; Eleanor Sparagana, PhD Comparative History, Brandeis University; Andrew O'Shaughnessy, PhD Modern History, Oxford University.

#### *Visitation*

4l) *Are there any visitor statistics for the site?*

YES



41) *If YES, please provide the annual visitation for the most recent year it is available, indicating what year that is, a brief summary of the methodology for counting visitors, and briefly describe the trends in visitation. (In describing these trends, please use the year of inscription as a baseline.)*

Monticello:

Visitor Statistics for 2003: 464,733. This was the sixth consecutive year that visitation has decreased.

Visitors buy ticket and a computer generates the daily reports. The trend line has been down since September 11, 2001. Monticello has averaged approximately 312,000 visitors per year since 1924, when it was opened as a public attraction. Since 1980, the average annual attendance has been approximately 532,000. Monticello had more than 500,000 visitors each year for 21 consecutive years (1981-2001).

University of Virginia: Jeffersonian Precinct

Visitor Statistics for 2002:

Total	100,205
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Visitation records at the University of Virginia are kept by the Rotunda staff in which visitors are counted as they enter the building. The admissions office additionally records visitor statistics for prospective students and student-orientation meetings.

4m) *Please briefly describe the visitor facilities at the property.*

Monticello has two centers--one with an exhibition, gift shop, and theater, and the other with ticketing facilities.

4n) *Is there tourism/visitor management plan for the property?*

YES

4n1) *If YES, please briefly summarize the plan, and provide a URL where the plan can be located.*

Monticello's tourism plan is included within its general management plan. Monticello has a detailed 213-page management plan, with rolling three-year financial projections. In addition a Historic Structures Report was completed in 1987

*Scientific Studies*

4o) *Please list key scientific studies and research programs that have been conducted concerning the site. (Please use the year of inscription as a baseline.)*

*4o1) Please describe how the results of these studies and research programs have been used in managing the World Heritage Site.*

The archaeology program enhances interpretation at Monticello and at the University and informs its restoration work. The archaeology Department was established in 1979 to advance our understanding of plantation life through archaeological remains and to insure that all sub-surface disturbances at Monticello would be approached responsibly. Their research has contributed directly to landscape recreations such as the vegetable garden terrace, the garden retaining wall, the planting plan for the main orchard, and the garden and orchard enclosure. Their research also was fundamental in confirming the alignment of the restored mountaintop road (known from survey plats) and the location of some of the trees that lined the road. Their systematic excavations also were essential to the recreation of a garden pavilion and to the restoration of the terraces and built-in planters at the four corners of the main house. The plantation survey, begun in 1997, has addressed the broader landscape and helped document changes made over time. Their research will be fundamental in guiding decisions about the long-term management and interpretation of the property at large.

*4o2) What role, if any, has the property's designation as a World Heritage Site played in the design of these scientific studies and research programs? For example, has there been a specific effort in these programs to focus on the recognized World Heritage values of the property?*

The World Heritage status of the properties has not played a significant role in the research programs at the either site.

#### *Education, Information and Awareness Building*

*4p) Is there a plaque at the property indicating that it is a designated World Heritage Site?*

NO

*4q) Is the World Heritage Convention logo used on all of the publications for the property?*

NO

*4r) Are there educational programs concerning the property's World Heritage values aimed at schools?*

NO

4r1) *If YES, please briefly describe these programs.*

Not Applicable

4s) *Are there special events and exhibitions concerning the property's World Heritage values?*

NO

4s1) *If YES, please briefly describe them.*

Not Applicable

4t) *Please briefly describe the facilities, visitor center, site museum, trails, guides and information material that are available to visitors to the World Heritage Site.*

Monticello has two centers--one with an exhibition, gift shop, and theater, and the other with ticketing facilities. Monticello's Internet site (<http://www.monticello.org/>) provides interpretive and orientation information.

The University of Virginia has a visitor information center in the lower east oval room of the Rotunda, with various brochures and placards describing the history of the Academical Village. The University provides a guide service, lectures, and exhibitions for further interpretation at the site. The University's Internet site includes a section on the Academical Village with extensive information on the historic architecture of the property, <http://www.virginia.edu/academicalvillage/index.html>

4u) *What role, if any, has the property's designation as a World Heritage Site played with respect to the education, information and awareness building activities described above? For example, has the World Heritage designation been used as a marketing, promotional, or educational tool?*

Monticello and the University are proud of their WHS designation, and it is often mentioned in public presentations and publications.

## **II.5 Factors Affecting the Property (See Section 5 of the current Nomination Form)**

*5) Please briefly identify factors affecting the property under the following headings: Development Pressures, Environmental Pressures, Natural Disasters and Preparedness, Visitor and Tourism Pressures, Number of Inhabitants Within Property and Buffer Zone and Other - major factors likely to affect the World Heritage values of the property. First discuss those that were identified in the original nomination, in the same order in which they were presented there, then those that have been discussed in reports to the World Heritage Committee since inscription, and then other identified factors.*

*This section should provide information on all the factors which are likely to affect a property. It should also relate those threats to measures taken to deal with them, whether by application of the protection described in Section 4e or otherwise.*

*Not all of the factors suggested in this section are appropriate for all properties. The list provided is indicative and is intended to assist the State Party in identifying the factors that are relevant to each specific property.*

*(In describing these trends, please use the year of inscription as a baseline.)*

*For EACH Factor, please specify the following:  
key actions taken to address factor  
any plans that have been prepared to deal with factor in the future  
whether the impacts of factor appears to be increasing or decreasing, and  
the timeframe for which the comparison is being made.*

### *Development Pressures*

*5a) Provide information about Development Pressures on the following: demolitions or rebuilding; the adaptation of existing buildings for new uses which would harm their authenticity or integrity; habitat modification or destruction following encroaching agriculture, forestry or grazing, or through poorly managed tourism or other uses; inappropriate or unsustainable natural resource exploitation; damage caused by mining; and the introduction of invasive nonnative species likely to disrupt natural ecological processes, creating new centers of population on or near properties so as to harm them or their settings.*

Not applicable

## *Environmental Pressures*

*5b) Environmental pressures can affect all types of property. Air pollution can have a serious effect on stone buildings and monuments as well as on fauna and flora. Desertification can lead to erosion by sand and wind. What is needed in this section is an indication of those pressures which are presenting a current threat to the property, or may do so in the future, rather than a historical account of such pressures in the past.*

Acidic deposition on stone is the foremost environmental threat and is mainly an issue at the University of Virginia due to the University's coal heating plant. The heating plant is consistently pollution output with upgraded systems, and a major improvement project is underway. The major concerns are oxidation of metal roofs and deposition on stone. These problems are alleviated by routine maintenance procedures. That being said however, environmental pressures are not at a critical stage for either property. Acid rain has increased, but it is not known to be at a critical level.

At Monticello, a plan is underway is to conserve--rather than rebuild--the rubble-stone walls that line the subterranean passages leading from the house. The idea is to construct secondary walls behind the passage walls to alleviate soil pressure and allow the planting of trees. Once the pressure is removed from the original walls, they can be compressed back into alignment, thereby insuring the preservation of the form and character of the stonework. The alternative is to rebuild the walls.

## *Natural Disasters and Preparedness*

*5c) This section should indicate those disasters which present a foreseeable threat to the property and what steps have been taken to draw up contingency plans for dealing with them, whether by physical protection measures or staff training. (In considering physical measures for the protection of monuments and buildings it is important to respect the integrity of the construction.)*

Fire threats are potentially the most threatening and have caused considerable damage in the past (e.g. 1895 Rotunda fire). Each property has current fire alarm and fire suppression systems, although coverage is not comprehensive at the Academical Village. The Rotunda and 5 pavilions have been upgraded with fire suppression systems. Fire suppression systems have not been installed in the student dormitories. Fires are not allowed in the Pavilion fireplaces, however the fireplaces in the student dormitories are used throughout the school year. The greatest fire threat therefore exists with the dormitories. The flues in the student rooms were recently lined to reduce the fire threat. With each building renovation, fire alarm and suppression systems upgrades are considered a priority.

Earthquake and hurricane are the most prominent natural threats with some historical occurrence in the area (e.g. Isabelle 2003), although never incurring significant damage to the historic properties. The threat remains reasonably low, therefore small efforts have been implemented, thus preserving the character and integrity of the existing architecture.

Following the September 11 attacks, the airspace was restricted above Monticello by the FAA.

### *Visitor and Tourism Pressures*

*5d) In completing this section what is required is an indication of whether the property can absorb the current or likely number of visitors without adverse effects (i.e., its carrying capacity). An indication should also be given of the steps taken to manage visitors and tourists. Possible impacts from visitation that could be considered include the following:*

- i. damage by wear on stone, timber, grass or other ground surfaces ;*
- ii. damage by increases in heat or humidity levels;*
- iii. damage by disturbance to the habitat of living or growing things; and*
- iv. damage by the disruption of traditional cultures or ways of life.*

Combined tourist numbers at both sites surpass a half million visitors annually. This number does not adversely affect the property.

### *Number of Inhabitants Within Property and Buffer Zone*

*5e) Include the best available statistics or estimate of the number of inhabitants, if any, within the property and any buffer zone and describe any activities they undertake which affect the property.*

The University of Virginia Jeffersonian Precinct continues to house students and professors at the Academical Village. There are approximately 100 student residents in the dormitories and 25 residents in the pavilions during the fall and spring semesters. During summer the dormitory rooms remain occupied by visitors to the University.

### *5f) List Other Factors*

Not applicable

**II.6 Monitoring**  
**(See Section 6 of the current Nomination Form)**

*Administrative Arrangements for Monitoring Property*

6a) *Is there a formal monitoring program established for the site? In this case, "monitoring" means the repeated and systematic observation and collection of data on one or more defined factors or variables over a period of time.*

YES

6a1) *If YES, please describe the monitoring program, indicating what factors or variables are being monitored and which partners, if any, are or will be involved in the program.*

Monticello's structures and grounds are routinely inspected by members of its buildings, gardens and grounds, restoration, and curatorial staffs.

*Key Indicators for Measuring State of Conservation*

6b) *At the time of inscription of the property on the World Heritage list, or while in the process of reviewing the status of the property at subsequent meetings, have the World Heritage Committee and the State Party identified and agreed upon key indicators for monitoring the state of conservation of the property's World Heritage values?*

NO

6b1) *If YES, please list and describe these key indicators, provide up-to-date data with respect to each of them, and also indicate actions taken by the State Party in response to each indicator.*

Not applicable

6b2) *If NO key indicators were identified by the World Heritage Committee and used so far, please indicate whether the World Heritage Site management authority is developing or plans to develop key indicators for monitoring the state of conservation of the property's World Heritage Values.*

Not applicable

*Results of Previous Reporting Exercises*

6c) *Please describe briefly the current status of actions the State Party has taken in response to recommendations from the World Heritage Committee at the time of inscription or afterwards, through the process known as "reactive reporting." (Note: The answer to this question will be "not applicable" for many sites.)*

not applicable

## **II.7 Conclusions**

### *World Heritage Values*

*7a) Please summarize the main conclusions regarding the state of the World Heritage values of the property (see items II.2. and II.3. above).*

The World Heritage values of Monticello and the University of Virginia continue to be well-maintained by both of the responsible organizations. Completion of the University's Historic Preservation Master Plan will ensure continued high-levels of stewardship of the Jeffersonian Precinct. The University will use the analysis and documentation of the Plan as a crucial piece of overall strategic master planning, continuing to develop a model preservation program across the entire site.

### *Management and Factors Affecting Site*

*7b) Please summarize the main conclusions regarding the management of and factors affecting the property (see items II.4. and II.5. above).*

Management of both component properties is highly professional and well-organized. Reorganization of the Office of the Architect to include the position of the Curator will take effect in 2003. To add to the professional oversight process, the University plans to convene a steering committee to provide peer review and guidance to staff. Stewardship of Monticello's historic resources comes under the purview of the professional staff of the Restoration Department and draws on the expertise of five other departments, including Curatorial, Research, Archeology, Buildings, and Gardens and Grounds.

Factors affecting the properties include acidic deposition at the University of Virginia due to the University's coal heating plant. Acid rain has increased, but it is not at a critical level. Fire threats are a potential threat at the University; however, fire suppression systems have been installed in a number of buildings and, in others, are considered a priority when the buildings are renovated.

### *Proposed Future Action(s)*

*7c) Please describe briefly future actions that the State Party has approved to ensure the conservation of the World Heritage values of the property.*

*These sample headings can be used as a checklist.*

- Modification of legal or administrative structure*
- Changes to financial arrangements*
- Increases to staffing level*
- Provision of training*
- Modification of visitor facilities*
- Preparation of a visitor management plan*
- Studies of public knowledge of the World Heritage Site*
- Emergency preparedness*
- Establishment or improvement of a monitoring program.*



Not applicable

*Responsible Implementing Agency(ies)*

*7d) Please identify the agency(ies) responsible for implementation of these actions described in 7c, if different from those listed in Section II.4.*

Responsible Implementing Agency #1

Entity Thomas Jefferson Foundation  
First Name: Dan  
Last Name: Jordan  
Address: Monticello, P.O. Box 316  
City: Charlottesville  
State/Prov: VA  
Postal Code: 22901  
Telephone: (434)984-9801  
Fax: (434)977-7757  
Email: djordan@monticello.org

Responsible Implementing Agency #2

Entity University of Virginia  
First Name: Anna  
Last Name: Towns  
Address: 575 Alderman Road  
City: Charlottesville  
State/Prov: VA  
Postal Code: 22903  
Telephone: (434)982-5829  
Fax: (434)982-5049  
Email: towns@virginia.edu

*Timeframe for Implementation*

*7e) If known, or predictable, please provide a timeline for the implementation of the actions described in 7c.*

Not applicable

*Needs for International Assistance*

*7f) Is it anticipated that International Assistance, through the World Heritage Fund, will be requested for any of the planned actions described above?*

NO

*7f1) If YES, please state the nature of the request and when it will be requested, if known.*

Not applicable

*Potential Decisions for the World Heritage Committee*

*7g) Please indicate if the World Heritage Site management authority has preliminarily identified, as a result of this reporting exercise, an apparent need to seek a World Heritage Committee decision to change any of the following:*

*(Note: Following completion of the Periodic Report exercise, the State Party, in consultation with appropriate authorities, will determine whether to proceed with seeking a Committee decision on these changes. To request such changes, the State Party will need to follow a separate, formal process, subsequent to submitting the report.)*

- change to criteria for inscription
- change to Statement of Significance
- proposed new Statement of Significance, where previously missing
- change boundaries or buffer zone

## II.8 Documentation

(See Section 7 of the current Nomination Form and Section 3 of the original Nomination Form)

8a) Please review the original nomination for the property to determine whether it is necessary or advisable to supply, update or amend any of the following documentation for the World Heritage Site. Indicate what documentation will be supplied to supplement the information found in this report. (This documentation should be supplied at the time the Periodic Report is submitted to the World Heritage Centre, in December 2004.)

- a) Photographs, slides and, where available, film. This material should be accompanied by a duly signed authorization granting, free of charge to UNESCO, the non-exclusive right for the legal term of copyright to reproduce and use it in accordance with the terms of the authorization attached.
- b) Topographic or other map or site plan which locates the WHS and its boundaries, showing scale, orientation, projection, datum, site name, date and graticule.
- c) A copy of the property management plan.
- d) A Bibliography consisting of references to all the main published sources on the World Heritage Site, compiled to international standards.

8b) Do you have a digital map of the WHS, showing its location and boundaries?

YES

8bi) If yes, in what format(s) is the map?

digital

8bii) Is it published on a publicly-accessible website?

YES

8biii) If yes, please provide the URL of the site where the map can be found. Must be a valid URL.

Future web publication on Monticello's website: <http://www.monticello.org/>

**Attachment 1:           Comprehensive Restoration Program for the Academical  
Village: The First Twenty Years**

May 31, 2002

**MEMORANDUM**

TO:                   File

FROM:               James Murray Howard, PhD, FAIA  
                      Curator & Architect for the Academical Village  
                      Kenan-Lewis Fellow in Historic Architecture

SUBJ:               Comprehensive Restoration Program for the Academical Village  
  
                      The First Twenty Years

As I prepare to depart the University of Virginia after twenty years of directing the first comprehensive program to restore and renovate the Academical Village, I take this opportunity to summarize the projects mounted during this period. It is my hope that this summary will help those who follow me to understand more fully and quickly the major actions carried out and the thinking behind those actions.

Apart from this summary are four printed-and-bound historic structure reports, commissioned externally for Pavilions I, II, VI and V, and one electronic historic structure report prepared internally for Pavilion VII. Also, construction documents, both drawn and written, and voluminous office correspondence exist for all work.

Principal attention in this era has been given to pavilions. Major interior work campaigns have been completed for Pavilions I, III, V, VI, VII and VIII. Brief and far less extensive campaigns have occurred at Pavilions II, IV, IX and X. Very minor interior work in the nature of minor short-term remodeling has been given to Hotels B and E.

Roof restoration in the manner of Jefferson's early metal plate roofs (but using stainless steel) has been scheduled independently of other restoration tasks and has occurred at Pavilions II, VI, VII and X as well as Hotels A and F. Prior to recreation of Jefferson's small plate technology, simple standing-seam steel roofs were resheathed as such at Pavilions I, IV and VIII. Stainless steel roofing applied in standing-seam fashion has also been used at McGuffey Cottage, Levering Hall (attached to Hotel F) and the Poe Alley office building. Slate roofs, none of which are of Jefferson's time, have been rebuilt at Pavilions III, V and IX as well as all blocks of student rooms fronting the Lawn.

The Rotunda has been the site of periodic interior work, though none of the intensity of the 1973-76 restoration of the interior and replacement of the dome covering. Major work to correct water problems at the Rotunda decks (stemming from work performed in the 1930s) constitutes the largest program there. It is presently underway, now entering the third year of a four-year schedule.

Recreation of early features at student rooms has been underway since 1998, with brief programs of summer work executed at East Lawn, 2, 4, 6, 8, 36, 38, 40, 42, 44, 46, 48, 50, 52 and West Lawn 9, 11, 13, 15, 17, 19, 21, 23, 25, 27, 29, 31, 33. This summer West Lawn 35, 37, 39, 41, 43, 45, 47, 49, 51, 53, 55 will receive the same attention. Separately all Lawn and Range rooms are entering the fourth and final summer of work to completely rebuild electrical systems.

The following chapters of this summary will detail in relatively brief prose form the work undertaken for the projects mentioned above. Within those descriptions, I will also explain the thinking behind the more consequential actions, especially those involving change to building fabric. While acknowledging the value of precise terminology, the reader should keep in mind the sometimes interchangeable use of the two terms *restoration* and *restoration*, as reflected in the general use of *restoration* to describe the overall work program. Context should inform the reader when precise use of terms is implied.

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## CHAPTER 1

### *Pavilion I*

Date(s) of Work: c. 1987-89 & 1997

Pavilion I was the third pavilion to receive major attention under the comprehensive Academical Village restoration program. Work conducted in 1986-89 constituted essentially complete renovation of the entire building, with only a few issues deferred to future revisits, probably coinciding with occupancy changes. Thus every ten years, on average, one expects minor episodes of work at the pavilions to refresh them for new occupants. Every thirty to fifty years, one might expect more extensive work, as systems exceed their useful life spans or as deferred issues become amenable to resolution. The work of 1997 was reconstruction of the front balcony.

Pavilion I was the first pavilion for which a formal historic structure report was prepared. Changes over time were few. A rear addition expanded internal area on ground floor and first floor. Plumbing for kitchen and toilet use resulted in a first-floor kitchen and a pair of bathrooms that captured most of the second-floor central hall. Pavilion I was unusual in that its interior walls had been repeatedly papered, unlike the other buildings where painted walls have long predominated. It was also unusual because it retained some early brick flooring still exposed to view. Just prior to the interior work, a separate reproofing project replaced a 20<sup>th</sup>-century painted standing-seam steel roof in-kind. This roofing work predated widespread discovery only a few years later of Jefferson-era tin-coated iron plate roofing concealed beneath later generations of roof covering at most of the neighboring pavilions. [Ultimately it was concluded that eight of the ten pavilions and all six hotels probably had that inventive and inexpensive roof system at the outset. Pavilion X received the first replication of the early system in 1988.]

## CHAPTER 2

### *Pavilion II*

Date(s) of Work: c. 1990-91 & 1997

Pavilion II has not yet received major attention under the comprehensive Academical Village restoration program. In 1990-91, it did receive some interior remodeling while the roof was being restored to replicate Jefferson's metal shingles. The work of 1997 was reconstruction of the front balcony.

Pavilion II was the third pavilion for which a formal historic structure report was prepared. However, due to an insufficiency of funds, major work could not be mounted at Pavilion II when occupancy there changed. Thus it has remained essentially in its pre-1990 state, which included at least two major changes – a rear addition of and a more recent set of alterations to the interior stair. Just prior to the latest occupancy change, roof restoration began. Since Jefferson's metal-shingle technology had never been used at the flat-roofed rear addition, a soldered flat-seamed metal roof was installed there. Roofing on both building segments is now terne-plated stainless steel.

## CHAPTER 3

### *Pavilion III*

Date(s) of Work: c. 1984, 1993 & 1997

Pavilion III was the second pavilion to receive major attention under the comprehensive Academical Village restoration program. Work conducted in 1984 constituted major renovation of the entire building, with some issues deferred to future revisits, probably coinciding with occupancy changes. Due to funding limitations a few major issues, such as complete rebuilding of the electrical system were deferred. The work of 1997 was reconstruction of the front balcony.

The formal series of historic structure reports did not begin until 1987. The primary dilemma at Pavilion III concerned the radical changes begun in the early 20<sup>th</sup> century, with installation of indoor plumbing. At that time or perhaps before, a unique feature was removed – a perimeter corridor at the northeast corner of the second floor, surrounding a small room that directly abutted the original stair vestibule and the major front room to the south. Evidence in floor planking showed that the small room had no windows, only doors opposite windows in the perimeter corridor. The present newer hallway, which is centrally placed, obscures the fact that a fireplace that was part of the central chimney mass served the small room. Also, a second bathroom was installed atop the second-floor stair landing, thus eliminating the view to the west and considerably reducing natural light for the stair. For the present, these extant 20<sup>th</sup>-century changes were left in place and remodeled, even though the opportunity to recreate a clearer image of the unusual early conditions was tantalizing. Limited funding played some role in this decision, but the greater concern was the ability to accommodate present-day families reasonably. Since Pavilion III is one of only two pavilions not to have expanded by addition, it has few options for placement of features such as bathrooms. Any location within the Jeffersonian portion of these buildings is unfortunate. Perhaps future, more extensive work at Pavilion III can address this problem anew.



## CHAPTER 4

### *Pavilion IV*

Date(s) of Work: c. 1984, 1992 & 1997

Pavilion IV has not yet received major attention under the comprehensive Academical Village restoration program. In 1984 and 1992, it did receive some interior remodeling. The work of 1997 was reconstruction of the front balcony.

The formal series of historic structure reports did not begin until 1987.

## CHAPTER 5

### *Pavilion V*

Date(s) of Work: c. 1993-4, 1997, 1999 & 2002

Pavilion V was the fifth pavilion to receive major attention under the comprehensive Academical Village restoration program. Work conducted in 1993-4 constituted essentially complete renovation of the entire building, with only a few issues deferred to future revisits, probably coinciding with occupancy changes. The work of 1997 was reconstruction of the front balcony. Occupancy changes in 1999 and 2002 occasioned minor repairs but few alterations.

Pavilion V was the fourth pavilion for which a formal historic structure report was prepared.

## CHAPTER 6

### *Pavilion VI*

Date(s) of Work: c. 1990-01

Pavilion VI was the fourth pavilion to receive major attention under the comprehensive Academical Village restoration program. Work conducted in 1990-01 constituted essentially complete renovation of the entire building, with only a few issues deferred to future revisits, probably coinciding with occupancy changes.

Pavilion VI was the second pavilion for which a formal historic structure report was prepared.

## CHAPTER 7

### *Pavilion VII*

Date(s) of Work: c. 1997 & 1998-2001

Pavilion VII was the sixth pavilion to receive major attention under the comprehensive Academical Village restoration program. In 1997, the roof was restored to replicate Jefferson's metal shingles. Work conducted in 1998-2001 constituted essentially complete renovation of the entire building, with only a few issues deferred into the future, principally the matter of introducing gas service and altering/repairing chimneys.

Pavilion VII was the fifth pavilion for which a formal historic structure report was prepared. It was the first for which that report was compiled electronically and in an open-ended format, thus initiating an electronic record base for work conducted within the Academical Village.

## CHAPTER 8

### *Pavilion VIII*

Date(s) of Work: c. 1984-5

Pavilion VIII was the first pavilion to receive major attention under the comprehensive Academical Village restoration program. Work conducted in 1984-5 constituted essentially complete renovation of the entire building, with only a few issues deferred to future revisits, probably coinciding with occupancy changes. Because residential tenants change in this building every four years, Pavilion VIII should be receiving modest routine work, primarily interior painting, on a more frequent cycle than elsewhere in the Academical Village.

The formal series of historic structure reports did not begin until 1987.

## CHAPTER 9

### *Pavilion IX*

Date(s) of Work: c. 1983, 1990 & 2000

Pavilion IX has not yet received major attention under the comprehensive Academical Village restoration program. In 1983, 1990 and 2000, it did receive some interior remodeling.

The formal series of historic structure reports did not begin until 1987.

## CHAPTER 10

### *Pavilion X*

Date(s) of Work: c. 1986-87, 1991, 1997 & 2001

Pavilion X has not yet received major attention under the comprehensive Academical Village restoration program. In 1986-87, the roof was restored to replicate Jefferson's metal shingles. In 1991 and 2001, it did receive some interior remodeling while the roof was being restored to replicate Jefferson's metal shingles. The work of 1997 was reconstruction of the front balcony.

The formal series of historic structure reports did not begin until 1987.

## CHAPTER 11

### *The Hotels*

Date(s) of Work: Various

The hotels have received only modest work during the past twenty years, due to occupancy and paucity of funding. Occupancy changes at Hotel B in 1984 and 1997 have occasioned two interior remodeling projects, neither of which could be classified as preservation ventures. In 1989 and 1993, Hotels D and E, respectively, received very modest interior remodeling. In 1994-5 and 1995-6, roofs at Hotels F and A, respectively, were restored to replicate Jefferson's metal shingles.

## CHAPTER 12

### *The Rotunda*

Date(s) of Work: c. Various

By the late 20<sup>th</sup> century, the Rotunda had become the single remaining building by Jefferson in the Academical Village that had lost most of its archaeological significance, first to fire in 1895 and, in the 1970s, to complete interior rebuilding. During the past twenty years, small episodes of remodeling or redecoration have respected the 1973-76 work, along with the few remnants to have survived the fire, as the present “archaeological base.” Recent exterior work has been of greater consequence. In 2000, an elaborate ramp was inserted below grade along the south side of the cryptoporticus (originally the “gymnasium”) to connect the present Rotunda entry level (originally the basement level) with the topmost level of the Lawn to the south. In that same year, a four-year restoration of deck and balustrade materials began, proceeding at the rate of one deck quadrant per summer from 2000 through 2003. Attendant minor interior renovation for office areas beneath is being conducted simultaneously.

## CHAPTER 13

### *The Student Rooms*

Date(s) of Work: c. 1988ff.

In 1998, an episodic project to renovate student rooms in the Academical Village began. Each subsequent summer, additional rooms receive this work. Twenty-six have been received this work so far; another eleven will do so during the summer of 2002. A few years before the comprehensive program began, replacement of slate roofs atop student rooms began. That work has continued as roofs became too decrepit to continue. To date, all slate roofing atop Lawn student rooms has been addressed thus; Range room roofs await that work.

**Attachment 2: Monticello Restoration Chronology**

**CHRONOLOGY OF RESTORATION AT MONTICELLO  
1923-2003**

- 1923** December 1. The Thomas Jefferson Memorial Foundation acquires legal title to Monticello.
- 1924** Repairs are made to the roof framing and a new sheet-metal roof is installed over new sheathing. This and other work is directed by Fred W. Twyman, chairman of the Foundation's Charlottesville committee.

The north and south dependency stone walls and terrace walks are repaired.

Steps with brick risers and treads are constructed at the Southwest Portico, replacing an earthen ramp dating from the nineteenth century. Cameron Clark, a New York architect volunteered his services. The work is completed in 1924 or early 1925.

- 1925** Sidney Fiske Kimball is named chairman of the restoration committee. Other members are R. T. Haines Halsey from the Metropolitan Museum of Art and Charles Moore, Chairman of the Commission of Fine Arts.
- 1926** The Van Yahres Tree Service begins a program of tree surgery sponsored by the Garden Club of Virginia.

The "Monticello Shop" opens in what was the Jefferson-period kitchen beneath the Southeast Terrace. A newspaper article at the time states that the location is the "old Jefferson laundry."

- 1927** The Garden Club of Virginia appoints a committee to consult with Fiske Kimball on the restoration of the grounds. Miss Amy Cogserve submits a planting plan (not executed).

"Redecorating" of the first floor is completed.

- 1928** The "slave quarters" under the south terrace are "restored."

- 1929** The Mulberry Row "barn" (Jefferson's stable) is "restored."

The stone house on Mulberry Row is remodeled. The building, then called the "Weaving House" (later, the "Weaver's Cottage") is used as a superintendent's house.

- 1931** The ice house is "restored."

Adolph Niedermayer & Sons, Richmond, paint the interior of the house.

- 1933** The Civilian Conservation Corps attempts to retrace the course of Jefferson's Second Roundabout encircling the mountainside.
- 1934** Congress appropriates \$30,000 for a new 1.235-mile entrance loop road. The route, designed by the U.S. Department of Agriculture Bureau of Public Roads, basically follows an earlier road. But sections of Jefferson's South Road and particularly the Fourth Roundabout, with its twists and turns that aligned closely with natural contours, are altered to conform to modern road standards. Work begins on September 15, 1934 and is completed April 22, 1935. Also included are new stone walls at the entrance to the grounds and new gates that the final narrative report calls "of Colonial design." These remain in place until 2002. The work is supervised by the Luray office of the Bureau of Public Roads. The second floor of Monticello is dedicated to the Daughters of the American Revolution.
- 1935** The wooded mountainside is cleared of underbrush, dead trees and stumps. The work is done in cooperation with the Civilian Conservation Corps.

Milton L. Grigg, architect, is named to the restoration committee.

- 1936** Adolph Niedermayer & Sons, Richmond, return to paint the interior based on research by Milton Grigg.

A treillage wallpaper pattern is discovered in the North Octagonal Room.

- 1937** Some of the joists supporting the main floor are replaced.

Curtains, draperies, alcove beds, bedspreads, and hangings, are added.

- 1938** Restoration of the north dependencies and terrace begins. Grigg & Johnson are the architects working closely with Fiske Kimball, chairman of the restoration committee. The contractor is Charlottesville Lumber Company, with Robert E. Lee, Jr. the principal in charge.

Brick walls are re-pointed.

The Levy sashes and the wood floor in the Northwest Piazza are removed, and a brick floor laid.

The terraces at the four corners of the house are rebuilt and the steps and floors paved with slate. The Jefferson-period terraces had been rebuilt during the Levy period.

Slate is added to the treads of the Southwest Portico steps (see 1924).

Edwin M. Betts is named to the restoration committee.

**1939** The West Lawn gardens are restored by the Garden Club of Virginia. Garland A. Wood is the landscape architect, with drawings by Floyd E. Johnson, architect. The work is completed in 1940.

**1940** The East Lawn is restored by the Garden Club of Virginia. Garland Wood is the landscape architect with drawings by Floyd Johnson.

**1941** The post and chain fence that encloses the East Lawn Ellipse is constructed. Floyd Johnson's design is funded by the Garden Club of America.

The south dependencies and terrace are restored. Milton Grigg is the architect (Floyd Johnson had left the firm to establish his own practice). R. E. Lee & Son is the general contractor. In January 1939 Robert E. Lee, Jr. (Bobby) and his father left Charlottesville Lumber Company and established their own firm. Subsequent work through the period of the 1980s will be by R. E. Lee & Son.

**1943** The stone house on Mulberry Row is remodeled (Floyd Johnson, architect). Among the changes is the addition of a window on the east and west sides of the Jefferson-period section. The structure, known as the "Weaving House," had been the residence of Thomas L. Rhodes, who retired as superintendent the year before at age 80. The new occupant is the president of the Foundation, Stuart Gibboney and his wife. As a cost-saving measure during the war Gibboney moves the Foundation operations from New York to Monticello and he assumes the role of superintendent.

**1944** Marie Kimball is named Curator (a non-resident position).

**1946** The Keystone Varnish Company, Brooklyn, donates paint for the "downstairs rooms." The painting is by J. A. Burgess of Charlottesville.

The deteriorated ceiling plaster and original lath are replaced in the Entrance Hall. The work does not involve the plaster eagle.

**1947** Exterior repainting is done by J. A. Burgess.

**1949** Stairs are constructed at the graveyard. The original design by Floyd Johnson is modified by Milton Grigg. Fox Brothers of Greenwood, Virginia, is the contractor. The cost is covered, in part, by the Garden Club of Virginia.

**1950** Fiske Kimball and Milton Grigg draft a sign for the tunnel connected to the interior privies: "Metal-lined carts were drawn out by an endless rope. This tunnel continued to the south as a vent for circulating air."



- 1951** April. A gift shop is opened on Mulberry Row a few feet east of the Weaver's Cottage. Milton Grigg loosely adapts the form of the "servant's house" (slave quarter) and the nearly adjoining "shed" (described also as "a store house for joiner's work") that are noted on Jefferson's 1796 plat of the buildings along Mulberry Row.
- 1952** Milton Grigg submits a proposal for the preservation and restoration of the house. The restoration committee includes Fiske Kimball (chairman), Marie Kimball, Milton Grigg, and Edwin Betts.
- 1953** A section of floor in the Monroe room (the North Square Room) fails, dropping several inches.

The restoration committee is reconstituted: Fiske Kimball (chairman), Charles Barham, Edwin Betts, William Hildreth, and Thomas Michie. Milton Grigg is retained as the restoration architect.

Brick walls are repointed and waterproofed with silicone. Brick chimney caps are rebuilt.

Monticello is closed from November 15 until February 27, 1954 for structural repairs and the installation of a central heating and air-conditioning system. R. E. Lee & Son is the general contractor. Wiley & Wilson are the engineers with Wachter & Wolff the air-conditioning contractor. The project involves the removal of the brick nogging that was packed between the floors and ceilings; the addition of steel beams notched into the first-floor joists; the taking up of the second-story floor boards and the substitution of steel for the wooden joists; the relaying of the second-story flooring; the removal of the tile and masonry floor in the Levy bathroom over the greenhouse; the relaying of the parlor floor over reinforced original joists (and new steel framing in the canted-bay section); the installation of air handling equipment in the cellar under the parlor; and interior painting based on Milton Grigg's analysis of early colors.

- 1954** The structural renovations are completed and Monticello reopened to the public February 27, 1954.

300 dogwoods (two-thirds white and one-third pink) are purchased for planting principally along the entrance and exit roads.

September. Alden Hopkins, landscape architect, submits a preliminary report, "Proposed Planting Revisions and Recommendations for Landscape Improvements at Monticello." The proposal is for replanting the East and West Lawn shrubbery and flower beds, but also includes a few general recommendations for the landscape near the house.

**1955** March 2. Marie Kimball dies at Philadelphia.

June 1. James A. Bear, Jr. becomes the first full-time curator.

Milton L. Grigg and R.E. Lee & Son collaborate on four restoration projects:

The dome and upper ("Terras") roof are restored. The Levy dormers are removed and skylights installed.

The slate on the east and west porticoes is reset with a cement base.

The Levy-period wood floor in the South Piazza (greenhouse) is replaced with Vermont green slate.

A domed structure is erected over the well near the South Pavilion. The project had been under consideration since 1941. With the absence of clear physical and documentary evidence a conjectural design is adopted based on a sketch by Jefferson for a circular, domed temple called a *Monopteros*.

August 14. Fiske Kimball dies in Europe.

**1956** The original plaster eagle in the Entrance Hall is removed after a trussed girder fails. The cracks in the plaster that were first noticed in the winter of 1955 were getting larger. Failure of the beam was attributed to the introduction of heating to the building. The original eagle is boxed and stored, and a replica installed.

Alden Hopkins is asked to prepare a complete plan for "landscaping, planting and shrubbing" the grounds. The project is terminated in July 1957 without a final report.

**1957** Oriol Pi-Sunyer carries out archaeological excavations at selective sites along Mulberry Row.

"Book boxes" for recreating Jefferson's library are installed in the Bookroom.

**1958** Vladimir Markotic conducts archaeological excavations at the site of the vegetable garden retaining wall.

The stone house (Weaver's Cottage) on Mulberry Row is further remodeled.

**1959** Curtis Thacker, Superintendent, plants one hundred rhododendrons and an equal number of mountain laurels in the woods along the paved loop road.

**1961** President of the Foundation William S. Hildreth signals the goal of future restoration and interpretation. On "The President's Page" of the *Report of the*

*Curator* he argues, “Although the house and its surrounding flower borders and grounds present what many consider a complete exhibit, other locations indicate the need for additional work. While not discussing the philosophical aspects or possible need for additional restoration at this time, it can nevertheless be pointed out that the sites of the Vegetable Garden Terrace, the North and South Orchards, the Roundabouts and some of the Roads might be brought back to their original appearance, according to Jefferson’s own plans and directions. Such activity would involve no departure from the Foundation’s past theme of preserving rather than restoring and restoring rather than reconstructing. Assuredly, Monticello would still be seen in, say, 1970, as the product of no architect’s imagination save that of its designer and builder, Thomas Jefferson.”

- 1963** The Second Roundabout is surveyed by Kurt M. Gloeckner and a topographic map of the area within the Fourth Roundabout is proposed.

Shadwell, birthplace of Jefferson and later one of his quarter-farms, is acquired by the Foundation. The 215 acres is purchased from the Jefferson Birthplace Memorial Park Commission, which in 1960 constructed a house thought to be indicative of the one built by Jefferson’s father. It remains open to the public until the Foundation closes it in 1964. In 1967 it is sold to the Ednam Forest Corporation and moved to a site near the Boar’s Head Inn west of Charlottesville.

- 1966** The furnishing of the Wine Cellar begins.

- 1967** The preparation of a site plan for the restoration and development of the area within the Fourth Roundabout is authorized by the directors. The firm of Ballou & Justice, Architects and Engineers of Richmond is employed to produce the master plan.

The Board of Directors approves the replacement of “the old and worn out brick floor” in the kitchen. The floor is not thought to date from the Jefferson era. A new brick paving is laid over a concrete slab.

- 1968** 795.025 acres at Tufton is purchased from Farwell W. and Lois Selby Perry. The main house, situated within a ten-acre enclave, is purchased from others in 1973.

- 1969** June. Following graduation from the School of Architecture in the University of Virginia, William L. Beiswanger is hired to produce working drawings of furniture. Philip R. Goyert, Jr. continues the project after Beiswanger leaves in September.

- 1970** A brick walk is constructed from the west end of Mulberry Row to the Graveyard. Although the alignment is based on a study of Jefferson’s surveys, it is actually several yards south of the original road, thus preserving the original road trace.

Curtis W. Thacker, Superintendent (and Treasurer) retires after twenty-two years of service.

**1971** William Beiswanger resumes the measured drawings project (furniture) after entering the graduate architectural history program in the University of Virginia.

**1972** A “Visitor Center” and parking lot are opened to the public in what was Jefferson’s park grounds south of the house and below the Fourth Roundabout. Ballou and Justice designed the modest 2,115 square foot facility in 1970. For the most part, the parking lot is laid out without altering the existing grades. It can accommodate 49 buses and 120 automobiles. The new circulation scheme includes a new back exit from the parking lot and a cut-off that links the exit road that runs past the graveyard to the entrance road near the facility. A walking trail connects the Graveyard to the shuttle station. The hilltop parking lot that accommodates approximately 140 vehicles is still in use.

A report on the history of the design, construction, and remodeling of the South Pavilion is written by William Beiswanger.

The roof framing over the second-floor South Octagonal Room is reinforced. Floyd Johnson is the consulting architect and Thomas A Hanson & Associates the engineers.

A study by Thomas A. Hanson & Associates, Richmond, confirms that the house is structurally sound.

**1973** June. The Resident Director’s house is occupied. The house designed by Floyd E. Johnson of Johnson Craven and Gibson is located east of the main house in an area that was part of Jefferson’s *ferme ornée* between the Second and Third Roundabouts.

Charles L. Granquist, Jr., is named Assistant to the Resident Director. Restoration of the house is under his direction.

The heating, ventilating, and air-conditioning controls for the main house are improved. Systems are also installed in the North and South Pavilions.

The main house at Tufton on 10.05 acres is purchased from Charles R. and Elizabeth B. Irving, thus securing much of the rural character within the middle-foreground view east of Monticello. (see also 1968)

**1974** The road survey project is expanded to include all original roads for which a Jefferson survey exists.

**1975** The Third and Fourth Roundabouts are surveyed.

The William S. Hanna Corporation, Cambridge, Massachusetts, examines the exterior masonry walls and finds them "in excellent shape." The only repairs recommended are for coping caps and at the east and west portico stairs.

William Beiswanger is appointed Research Assistant.

- 1976** A restoration plan for the garden and grounds is presented to the Board of Trustees.

William Beiswanger submits a report on Jefferson's grained doors with a proposal for restoration.

William Beiswanger is named Research Associate.

- 1977** Frank S. Welsh begins a paint and color analysis of Monticello.

Dieter Pluntke of Alexandria, Virginia, begins graining the Entrance Hall doors that had been stripped of their original graining in the early twentieth century.

"The Restoration of the Monticello Grove, Phase I, Report on Research and a Program for Restoration" is submitted by William Beiswanger.

Rudy J. Favretti is retained as the landscape architect for the re-creation of the Grove. William Beiswanger serves as the coordinator for the project.

December. Peter J. Hatch begins in his position as Superintendent of Grounds. He is the first professional horticulturist on the Monticello staff. Research of historic plants begins.

- 1978** Planting of the re-created Grove begins.

The southwest section of the First Roundabout, including the western half of Mulberry Row, is re-created. Evidence of the earlier dirt road is encapsulated by building up the surface with crushed brown gravel and stone dust.

"Report on Research and a Program for the Restoration of the Monticello Vegetable Garden Terrace, Orchard, Vineyard, Berry Patches, and Nursery," by William Beiswanger is presented to the trustees. One of the recommendations is that an archaeologist be hired.

William Beiswanger is named Architectural Historian and continues to coordinate landscape restoration.

- 1979** William M. Kelso is hired as the staff archaeologist and with a small crew begins excavations in the vegetable garden terrace.

Planting of the Grove is completed.

The Entrance Hall, Parlor, and Jefferson Bedroom furnishings are rearranged more in keeping with Jefferson's scheme. The arrangement alters visitor circulation through the house.

An examination of the house and dependencies for termite damage proves negative.

September. Lucia Stanton Goodwin is named Research Associate.

**1980** The archaeological excavations focus on the paling fence and entrance gate to the vegetable garden, the planting beds, and the terrace retaining wall.

"A Survey Plan and Map of Jefferson's Concept for a *Ferme Ornée* at Monticello" is produced by William Beiswanger.

Peter Hatch's "Report on the Forestland of the Thomas Jefferson Memorial Foundation" argues against opening Monticello Mountain and the Foundation's contiguous land to commercial forestation or harvesting. Recommendations are made for twelve zones.

**1981** William Kelso issues his "Summary Report of the Archaeological Investigation of the Garden at Monticello, 1979-1980."

"A Proposal for the Re-creation of the Vegetable Garden, Orchard, and Vineyards at Monticello" by William Beiswanger is presented to the trustees.

Thomas Wieboldt completes his floristic study of Monticello Mountain. One objective of the survey is to record the flora before plants introduced to the restored areas "escape" into the landscape.

H. Andrew Johnson fills the newly established position of Restoration Specialist and begins the ongoing project of restoring the mahogany sashes.

The Northeast Portico columns and the "rusticated" entrance wall are restored to the original sand-painted finish.

Rudy Favretti is hired to detail the reconstruction of the 1,000-foot-long vegetable garden terrace wall. The mason Shelton Sprouse begins construction of the dry-laid stone wall. Much of the stone comes from the exit road wall, which was said to have been built by the Levys from stone removed from the garden wall.

The tree locations are determined in the South Orchard based on archaeological and documentary evidence. Locations are field-surveyed.

Peter Hatch submits his report "Fruits and Vegetables at Monticello: A Study of Varieties and Culture."

David Hart, a preservation architect from Boston working with Polaroid, x-rays the dome. The project is promoted by Douglas James Harnsberger, a graduate student of architectural history in the School of Architecture, University of Virginia as part of his thesis, " 'In Delorme's Manner...' A Study of the Applications of Philibert Delorme's Dome Construction Method in Early 19<sup>th</sup> Century American Architecture" (defended successfully May 1981). The x-rays, which must penetrate a lead-coated copper roof, confirm that the structural system specified by Jefferson was largely followed.

Furnishing and rearrangement of the kitchen is completed.

**1982** An exhibition on archaeology is installed in the cellar under the Entrance Hall. The first trees are planted in the re-created South Orchard. Virgouleuse and Cressane pears from Faversham, England, are received at the Beltsville, Maryland quarantine center.

Archaeological excavations focus on the building sites along Mulberry Row, the northeast section of the Vegetable Garden Terrace, and the northeast section of the First Roundabout.

The stable area under the North Terrace is refurbished.

Charles Granquist and Andrew Johnson design and construct a rope-making machine and begin the production of sash cord.

**1983** The removal of parking lots on top of the mountain begins in order to restore the eastern end of Mulberry Row and the eastern end of the Vegetable Garden.

The last stone is placed in the reconstructed 1,000-foot-long garden wall.

Archaeological excavations continue along Mulberry Row and the First Roundabout.

Construction of the northeast section of the First Roundabout and the South Road (from the Mulberry Row Stable to the entrance walk at the house) begins.

William Kelso submits his "Report on the Archaeological Excavations at Monticello, 1982-83."

**1984** The Dome Room is restored. New sashes (based on one surviving semi-circular sash) are installed in all eight windows. The walls are painted a mars-yellow distemper. Floyd E. Johnson, architect.

The restoration of the mahogany sashes for the northeast façade is completed. Varnish is used on both the interior and exterior faces.

The Garden Pavilion is dedicated. The re-creation is based on archaeological evidence and Jefferson's notes. Floyd Johnson is the architect for the project.

The first honey locusts are planted along the northeast section of the First Roundabout. The planting is based on archaeological and documentary evidence.

**1985** January 1. James Bear retires. Daniel P. Jordan begins as Director.

Figs from Bremono are planted in the Submural Beds.

The first vines are planted in the Northeast Vineyard.

Archaeological excavations are underway in the carriage turnaround adjoining the North Terrace.

Charles Granquist resigns.

**1986** Susan R. Stein begins as Curator.

The modern road that cuts through the site of Jefferson's North Orchard is removed and the northwest section of the First Roundabout is restored. Gravel is used since the road is used for vehicular traffic. A point is made to preserve the original roadbed under the paving.

The "1 in 10" road that connects the First and Second Roundabouts on the northwest side of the mountain is re-established.

Honey locusts are planted along the northwest section of the First Roundabout.

The first plants are set out in the "Berry Squares" in the South Orchard.

Gloeckner, Lincoln, & Osborne complete the topographic mapping of the area within the Fourth Roundabout at a scale of 1" = 20' and a contour interval of 2'. They also complete the mapping of Jefferson's land south of the Rivanna River at a scale of 1" = 200' and a contour interval of 5'.

**1987** Archaeological excavations continue for a second season in the carriage turnaround area.

Gloeckner, Lincoln, & Osborne prepare a topographic map of the area within the Fourth Roundabout, showing Jefferson's original road system. Scale: 1" = 100'.

The Research Department is created with Lucia C. Stanton as Director.



December. Mesick Cohen Waite, architects are hired to produce an historic structure report on the design, construction and subsequent changes to the roof. John I Mesick is the partner-in-charge and M. Jeffrey Baker the project manager.

- 1988** The restoration department is created with William Beiswanger as Director. A master plan for restoration is written and incorporated in the Foundation's "Master Plan 1988-1993" presented to the trustees in April.

"Monticello Preservation Maintenance File: Grained Doors" is compiled by Amy E. Facca.

A plan is presented for the interpretation of Mulberry Row by signs and the outlining of building sites.

- 1989** The Foundation contracts with The Trust for Public Land and Land and Community Associates to prepare a viewshed study.

March. William Kelso takes leave to work at Poplar Forest. Barbara J. Heath is Acting-Director.

Summer. The archaeologists conduct a limited investigation of the Southwest Portico and sections of the southwest front of the house. Barbara Heath's final report is dated June 1990. Although they are able to confirm that the space between the columns and the steps is a Jeffersonian feature, they cannot verify if the area was covered in grass. Finding no evidence of paving, Milton Grigg had speculated that the area was grassed over. The archaeologists also conclude that "no drainage moat exists, or ever existed, along the west front of the house" as shown on Jefferson's first-house drawings.

August. Barbara Heath submits her report, "Archaeological Excavations of the North Orchard 1984-1989." A definite pattern of tree stains, indicative of the layout of the north orchard, was not found.

August. The firm Mesick Cohen Waite is engaged to prepare an historic structure report on the main house, dependencies, Weaver's Cottage, and the Mulberry Row Stable.

October. Architects from the Historic American Buildings Survey/Historic Engineering Record of the National Parks Service begin measuring Monticello. Their field office is in the upper room of the North Pavilion. A Preservation/Maintenance Manual is produced.

December. The Dome Room oculus is covered with a hand-blown sheet of glass, made by Oberglas at Barnback, Austria.

**1990** April. The “Monticello Viewshed Analysis and Protection Strategy” is completed.

William Beiswanger submits a plan for the North Orchard. It is based on both a Jefferson drawing of the North Orchard from the 1790s and the precedent for the spacing of trees in the South Orchard. The archaeological investigation had failed to confirm a pattern of tree plantings (see 1989).

August. William Kelso returns as Director of Archaeology.

August. After an historic structure report is received from Mesick Cohen Waite, plans are made to restore the roof of the main house.

The field-note phase of the Historic American Buildings Survey measured-drawings project is completed.

Stairs are constructed between Mulberry Row and the Vegetable Garden at the site of the main gate to the garden, on axis with the All-Weather Passageway. The wooden stairs are not built into the slope because of existing utility pipes and the need to preserve archaeological evidence. Floyd Johnson is the architect and McCormick Construction Co. the contractor.

**1991** Hughes crabapples are planted in the North Orchard.

Rieley & Associates (William D. Rieley, principle) prepare a detailed plan of the existing trees and shrubs within the First Roundabout.

H. Andrew Johnson’s title changes to Architectural Conservator.

Mesick Cohen Waite produce working drawings for the restoration of the roof.

Structural repairs are made to the deteriorated joist and rafter ends as a necessary first phase of the roof restoration. The work is done by Robert L. Self, Antique Restoration and Conservation, Scottsville, Virginia. Robert W. Newcomb, Foreman from the Monticello buildings staff, assists in the restoration. This work is completed in September.

**1992** January. A sample of garden paling is constructed. It ranges from the Weaver's Cottage to the Levy gravesite.

January. Barbara Heath leaves to direct archaeology at Poplar Forest. The directorship reverts to William Kelso.

October. The roof restoration is completed. Tinned-stainless steel shingles are substituted for the tinned-iron shingles that covered the dome and main roof in the 1820s. Painted stainless steel is substituted for the painted sheet iron that covered

the upper "Terras" roof after 1803. Lead is used to cover the cap of the Dome and the margin of the roof. A new balustrade is constructed that follows more closely Jefferson's classical design and incorporates more than fifty original balusters. Twelve skylights in the Jeffersonian manner are made and a special protective cap for the Dome Room oculus glass detailed. The general contractor is Henry H. Lewis of Owings Mills, Maryland. Anglia Lead from Norwich England executes the leadwork. The adhered rubber membrane that serves as a secondary roof under the metal cladding is by Martin Roofing, Charlottesville. Sheet-metal work is by Joyce & Company, Altamont, New York; masonry restoration is by Cersley Masonry, Charlottesville; and restoration of wooden elements such as the dome cornice moldings is by Robert L. Self, Antique Restoration and Conservation, Scottsville, Virginia. The restoration re-creates what was probably the most complex roof on a house in America for its time.

The CSX Corporation transfers to the Foundation 61.810 acres of land along both sides of the Rivanna River at Shadwell. The land includes Jefferson's two mill sites. Only a small section of exterior wall remains of the larger manufacturing mill.

**1993** January. A protective Lexan cover, molded to the configuration of the dome oculus glass, is installed.

The Entrance Hall floor is painted grass green. A floor cloth, painted the same color, is laid over the floor.

The South Square Room is painted indigo blue using acrylic to imitate distemper.

June. William Kelso leaves to conduct archaeology at Jamestown Island. Susan A. Kern is Acting-Director.

August. Mesick Cohen Waite complete the Historic Structure Report.

Archaeological excavations are carried out in the "Old Nursery" below the garden wall.

The Southwest Vineyard is recreated. Vines of the Sangiovese grape is the exclusive planting..

**1994** May. H. Andrew Johnson resigns to begin a career in teaching.

June. A "Master Plan for the Restoration of the House and Dependencies" is submitted. The five-year plan is developed around four themes: "Preserving What We Have;" "Interpreting Features that Reflect Jefferson's 'Greater Eye to Convenience';" "Recovering Decorative Finishes;" and "Documentation and Educational Outreach."

September. Robert L. Self begins as architectural conservator, succeeding H. Andrew Johnson.

The "Old Nursery" below the garden wall is laid out and enclosed with a paling.

By reorganization of the Foundation, the Executive Director (now President) limits the number of individuals that report to him. The Director of Restoration begins reporting directly to the Curator.

- 1995** Rieley & Associates are engaged to plot the tree locations along Mulberry Row based on Jefferson's survey notes and plats. Archaeological excavations along Mulberry Row help to determine the original location of trees.

Seedless white mulberries are planted along Mulberry Row from the Weaver's Cottage to the southwest end. Funding is from the Jack Jouett chapter of The Daughters of the American Revolution.

May. William Beiswanger prepares proposals for investigation and restoration of the Southwest Portico steps and the terraces at the four corners of the house. Each summarizes the documentary evidence, outlines what further investigation is needed (mostly archaeological), and projects costs.

Susan Kern leaves to pursue graduate studies.

September. Fraser D. Neiman begins as Director of Archaeology.

December. A committee on restoration is established. William Beiswanger (chair), Peter Hatch, Ann Lucas, Michael Merriam, Fraser Neiman, Susan Stein, Douglas Wilson. The "mandate" from the President is to "prepare a restoration master plan for Monticello (house, plantation, and grounds);" to "identify issues to be resolved, with recommendations for the TJMF President; and provide communication and coordination for 1) ongoing projects, and 2) with the Committee on Research and Interpretation, which is charged with charting an interpretive course for the Foundation."

- 1996** The Restoration Committee completes a draft of a restoration document covering mission, means, principles, policy, procedures, and a five-year master plan (1997-2001).

The final set of sashes in the parlor, as well as the set in Jefferson's bedroom, are restored.

Robert W. Newcomb from the Buildings Department begins as a restoration specialist, working exclusively on the historic structures. He is joined by Carol Richardson in 1998.

Documentary evidence is compiled about the terraces at the four corners of the house and the Venetian porches at the south and east terraces flanking the Southeast Piazza.

Summer. Katherine G. Revell, the Gilder Research Fellow, submits her "Research Report with Recommendations for Reinterpreting and Refurnishing Monticello's Kitchen and Related Dependencies." The study is done under the direction of Susan Stein,

August. Susan Kern's "Report on Archaeological Investigations at Shadwell, Albemarle County, Virginia 1991-1995 is completed.

August. Anna G. Koester, from the Curatorial Department, completes a comprehensive three-volume report, "The North Pavilion: Design, Construction, Use, Restoration, and Furnishing. This is followed in September by "The South Pavilion: Design, Construction, Use, Restoration, and Furnishing" in three volumes.

November. Heavy rain causes an eight-foot section of the garden-terrace wall to collapse. The double-tier section constructed in 1981 is above the Southwest Vineyard. Archaeological excavations are undertaken before the wall is rebuilt by Shelton Sprouse. See archaeological report, November 2000 by John Metz, et al.

**1997** January. The archaeologists begin a property-wide survey. Shovel-test pits (STPs) are dug every forty feet on center. They begin in the "Antient field" on the northeast slope near the summit of Monticello Mountain. The focus of the first phase will be the eastern slopes (See 2003).

April. The archaeologists excavate a five-foot-square unit in the kitchen along the south wall where it was thought that a stew stove was located. They discover that under the modern (1967) brick floor is an inch of bedding mortar covering at least five inches of concrete. The overall disturbed depth is at least eight inches, leaving no evidence of earlier features (John Metz, field manager). See report November 2000).

April-July. The archaeologists conduct excavations at the four terraces at the corners of the house. Their work also includes the triangular ledges that fill the space between the stairs and the angled wall of the house. Evidence is uncovered that indicates that the four corner triangles were designed and used as planters. They also uncover evidence about the sequence of building in the area dating back to the 1770s and the first-house period (see archaeology report, November 2000. John Metz, field manager.)

Mesick Cohen Wilson Baker prepare drawings for the four corner terraces and the Venetian Porches at the south and east terraces. The Venetian Porches are based

on a plan by Jefferson for the louvered work at the south porch, on Jefferson letters, and on photographs taken before the enclosures were removed in the 1890s.

Brickwork is completed by Henry Cersley at the four corner terraces.

The structural integrity of the Dome Room floor, third-floor hallway floor, Entrance Hall balcony, and the north All-weather Passageway walls is evaluated by engineer James Madison Cutts. Action is proposed for the All-weather Passageway.

The trustees approve a restoration master plan for 1997-2006.

**1998** Robert Self and Robert Newcomb construct the wooden floors and stairs at the four corner terraces.

The enclosures for the Venetian porches at the south and east corner terraces are constructed. Gaston & Wyatt is the fabricator of all the louvered work. Installation is by G&W, Robert Self and Robert Newcomb.

H. Andrew Johnson, the former architectural conservator, returns to grain the Dome Room doors. In 1977, when the first doors were restored, the approach had been to carefully remove the later coats of paint to expose the original graining and then either to leave the graining as found (usually with some touch-up) or, if in poor condition, to apply a clear isolating coat and re-grain, imitating the figures as found. Since many of the doors are located where they could be marred by visitors, it is decided that the original graining should not be exposed, but rather, the existing paint surface should be scraped, sanded, primed, and then grained in a style based closely on original examples.

The Jefferson Bedroom and Dining Room skylights are re-glazed, using a laminate of chemically-strengthened annealed glass and Benheim "restoration glass" with a wavy appearance. The laminate of tempered and standard "restoration glass" installed in 1992 was showing stress cracks.

The triple sashes in the North Octagonal Room are restored.

**1999** April-May. The archaeologists excavate a five-foot-wide section of the Southwest Portico steps (Sara Bon-Harper, field manager). See 2001 for report. The restoration of the Venetian Porches is finished (hardware and door blinds hung; metal roofing installed; ceilings plastered). The blinds are by Gaston & Wyatt; the H and HL hinges by Kenneth Schwarz, a Colonial Williamsburg blacksmith; the slide bolts by Henry Cersley, the plastering by Robert Harris; and the replicated sheet-iron roofing by Martin Roofing. The louvered work is painted a grass-green, based on a color found on a Jefferson-period slat discovered in the attic. The decision is made to use modern pigments in an acrylic binder to replicate the appearance of freshly painted verdigris over a white primer.

Following a report by William Beiswanger, all the exterior blinds on the house are changed from the "Charleston green" (almost black color) to "grass-green."

The North Privy floor, seat, and passage walls are restored.

Graining of first-floor doors continues: South Square Room (two doors, both sides); North Square Room (two doors, both sides); North Octagonal Room outer door (two faces); Cabinet door in passageway to Jefferson's chamber (chamber side); Dining Room alcove door (passageway side); first-floor south passageway privy door (passage side); closet door in Jefferson's chamber (chamber side); Jefferson's chamber door in passage to Cabinet (chamber side).

*Monticello in Measured Drawings* is published. The drawings are by the Historic American Buildings Survey/Historic American Engineering Record with commentary by William Beiswanger.

**2000** The North and South Pavilion roofs are restored. The north is covered with tinned-stainless shingles, replicating the tinned-iron version installed in 1821. Daniel Joyce is the roofer. At the South Pavilion old-growth cypress is used as a substitute for Jefferson's chestnut shingles. These will be painted white based on physical evidence. The roofing is by the Restoration and Buildings departments.

Exterior blinds are installed at the pavilion windows.

The North Privy restoration is brought to a level of completion with the plastering of the inner room.

Restoration of the Tea Room sashes is completed.

Window sashes are painted white on the exterior. The change from a varnished finish is based on a re-evaluation of documentary and physical evidence. A research report, with recommendations, is by William Beiswanger.

Sixteen second-floor door faces are grained: the two North Square Room doors; the two North Octagonal Room doors; the two South Octagonal Room doors; "Appendix" door; South Square Room outer door.

The wind vane is restored.

Replication of missing and heavily worn door hardware begins. Christopher E. Dunham is the brass founder.

A failed beam in the Southwest Portico is replaced.

Decayed girders along the Northwest Terrace are replaced.

A plan is proposed for the restoration of the north All-weather Passageway. Temporary shoring is installed.

The Architectural Conservator's formal title is changed to Conservator of Architecture and Furniture.

September. The Foundation grants an easement on the 215 acres at Shadwell to the Virginia Board of Historic Resources.

November. *Archaeological Investigation of the Garden Terrace, Kitchen Dependency and Corner Terraces* by John Metz, et al, is published as Number 1 in *Monticello Department of Archaeology Technical Report Series*.

- 2001** A recreation of Jefferson's spherical sundial is installed at the angle of the Northwest Terrace. The installation includes a replica of Benjamin Latrobe's Corn Capital from the U.S. Capitol, and a pedestal based on Jefferson's design.

The sashes in Jefferson's Cabinet are restored.

The North Pavilion basement walls (particularly the northwest wall) are re-pointed.

The second-floor Nursery door, the third-floor South Bedroom door, and the passage side of the North Attic door are grained.

*Monticello's West Portico Steps: New Archaeological Evidence* by Sara Bon-Harper (Archaeology Research Manager) with mortar analysis by D. S. Lane (Virginia Transportation Research Council) is published as Number 4 in *Monticello Department of Archaeology Technical Report Series*. The evidence supports the conclusion that although Jefferson intended to construct masonry steps at the Southwest Portico at the end of his life, only the substructure was built. The earthen ramp seen in images from the nineteenth century, and still in place until 1924, either dates from the last years of Jefferson's life or shortly thereafter.

- 2002** Evidence of the Jefferson-period kitchen is assessed by a Colonial Williamsburg Foundation team headed by Mark R. Wenger and Willie Graham.

An investigation of the Southwest Portico fails to prove the installation of blinds between the columns as called for by Jefferson.

The inner door to the North Octagonal Room and the passage face of the South Attic door are grained. This brings to conclusion the program for restoring the doors in the house.

The program to restore all first-floor sashes and the few remaining original second-floor sashes is brought to conclusion.



Robert Self submits a report detailing window condensation problems and offering possible solutions.

Storm sashes for the Dome Room are fabricated and installed by Allied Window, Inc. Prototype interior storm sashes are installed in the Tea Room.

Results of a physical investigation of Jefferson-period wallpaper in the Dining Room are inconclusive.

**A bridge at the entrance to the grounds is dedicated. The bridge improves the safety of vehicular access to Monticello and connects the parkway trail that leads from the base of Route 53, along Mt. Alto, and terminates at the Shuttle Station. The historic entrance just to the west of the Gatehouse is closed. The new entrance is about two-hundred feet to the east. Both the parkway and bridge are designed by Rieley & Associates, Landscape Architects (William D. Rieley, Roxanne S. Brouse, principals).**

**2003** January. Martha Hill submits a comprehensive report on the history of Mulberry Row. Fifteen volumes are needed to cover the subject, which was begun in January 2001 as the “Mulberry Row Project” under the direction of Dianne Swann-Wright (Director of African-American and Special Programs) in consultation with a staff committee.

April. The archaeological survey of the eastern slopes down to the Rivanna River is completed. The survey covers about 340 acres of the slightly over 2,000 acres owned by the Foundation. The goal is to survey all the acreage except where there are extreme slopes, buildings, or other inhibiting features such as parking lots (see 1997).

Exhibits, with “reader-rails” are installed in the Cook’s Room, the storage cellar under the Cabinet, the storage cellar under the Jefferson Chamber (interpreted as a beer cellar), and in the North Privy.

Mark R. Wenger, Willie Graham, and Alfredo Maul submit their final report, *Monticello Kitchen Fireplace Restoration Stew Stove and Set-Kettle Reconstruction*. All three are from the Colonial Williamsburg Foundation Research Division, Architectural Research Department.

The Dome Room walls are repainted with a reformulated distemper. The color is, as before, Mars yellow.

The Kitchen, first restored in 1941, is altered to reflect a new understanding of the original fireplace opening, oven, set kettle, and stew stove.

William L. Beiswanger  
Robert H. Smith Director of Restoration  
10/3/03

