

## INTRODUCTION

The Bostonian Society—Boston’s historical society and steward of the Old State House—seeks a grant of \$150,000 over two years to hire a Director of Public History and an Archivist. These individuals will fill a critical gap in the Society’s staffing and increase institutional capacity, making it possible for the organization to conduct museum research internally and respond more fully to research requests from scholars and the general public. One of the primary tasks to be assigned to these individuals during the grant period will be research in support of a new interpretation that is being developed for the Old State House (OSH).

## STATEMENT OF NEED

### **Background**—*Preserving/interpreting the OSH, serving the public, reaffirming an institutional priority*

The Society was founded in 1881 to save Boston’s Old State House from demolition. Since that time, the Society has served as the steward and protector of the Old State House, and has operated it on behalf of Boston’s citizens as a museum of the city’s history. Built in 1713, the OSH was the crucible of the American Revolution, and it was here that many of the basic principles of American democracy were first expressed. The Old State House is a National Historic Landmark and also is a central site on Boston’s Freedom Trail: in 2007, the OSH Museum attracted some 95,000 visitors from around the globe. In addition to operating the OSH, the Society has assumed many of the functions of a traditional historical society over the years, a shift reflected in the mission statement adopted by the Society in 2001. These activities include providing a research library, digitizing and making its collections available online, offering public programs and exhibitions that cover the full scope of Boston’s history, and managing the city’s historical markers program.

In 2005, the Society redirected its institutional focus to remedy a near-catastrophe involving water penetration that threatened the structural integrity of the OSH. When neither of the Society’s longtime partners—the City of Boston, which holds title to the site, and the National Park Service—were able to meet their longstanding obligation to provide for the preservation of the building’s historic fabric, the Society’s board of directors voted to take action, and authorized the solicitation of funds for urgent repairs. Further, the board has allocated restoration funds in the Society’s operating budget for each of the succeeding fiscal cycles. In so doing, the directors have re-affirmed their commitment to the purposes for which the organization was founded.

A subsequent engineering study commissioned by the Society revealed significant deterioration of historic fabric throughout the building. Within this dismal assessment, however, the Society recognized an opportunity to restore the building, remedy other non-structural problems, and enhance the overall visitor experience. To guide this transformation and revitalize the site, the Society developed a comprehensive plan for the stabilization, restoration, and re-interpretation of the OSH. The stabilization phase of the plan was completed in the summer of 2008. The Society now is poised to undertake the subsequent phases of the master plan, which include making the building visitor-friendly and handicap-accessible, and creating a vibrant new interpretation for the site that will, for the first time, tell its story as the crucible of the American Revolution and American democracy. Since 1881, the OSH has functioned as an all-purpose museum of Boston history, a model that has never served the Museum’s audiences effectively, whether local visitors or tourists. Many are expecting an “Independence Hall experience” and encounter instead a typical city museum.

Last year, a consultation grant from the National Endowment for the Humanities made it possible for the Society to convene a panel of distinguished historians and museum experts to begin planning a new interpretation for the OSH. The panel unanimously endorsed refocusing the building on the years 1760 through 1776 and Boston’s role in the Revolution, identifying key topics and themes to be highlighted, and developing conceptual scenarios for presenting them (see attached report to NEH). The Society’s Freedom Trail partners have expressed enthusiasm for these interpretive concepts, noting their potential to provide context that currently does not exist—not only for the OSH but for all Freedom Trail sites—and to offer visitors the story

that drew them to Boston. The next step in the planning process is to conduct the historical research that will provide content for new exhibitions, a task for which the Society currently lacks the internal capacity. The Society's staff has begun preliminary work to develop and test content for the new interpretation. One of the primary vehicles for this is a pilot project with Wellesley College, called *Mapping Revolutionary Boston*. This project will develop an interactive map feature for the Society's website intended to place the OSH within the context of colonial Boston. The feature will help visitors understand the complexity of the colonial city, and the events that occurred during the Revolutionary Era, in relation to one another, the modern city, and the OSH.

Concurrent with its deliberations over the OSH, the Society has been examining new ways to make its library collections accessible and provide the services required by 21<sup>st</sup>-century users. As with many specialized libraries, on-site research has declined precipitously in the past five years; at the same time, usage of the library's online resources has skyrocketed. Unfortunately, the competition for institutional resources, compounded by the need to focus on the OSH, has prevented the Society from providing library services at a level that meets current patron expectations.

### **Strategic Planning—Process, participants, and recommendations**

The need to dedicate the organization's limited staff and financial resources to the OSH project has fueled a growing realization that the Society lacks the capacity to fulfill satisfactorily its long-time objective of serving as a full-service city historical society, making it apparent that a new strategic vision is needed. The Society therefore launched a strategic planning process 18 months ago to define the Society's most appropriate and sustainable role(s) in the new century. Going into the planning process, it was pre-determined by the board that full implementation of the master plan for the OSH would form the first phase of the new strategic plan. The Strategic Planning Committee has affirmed this course of action, envisioning a revitalized OSH Museum as the foundation and catalyst for the Society's future.

A Strategic Planning Committee comprising board, staff, and community advisors has been meeting on a bi-monthly schedule, and will present its recommendations to the full Board of Directors in December 2008. The Committee's broad recommendations were reviewed and approved by the Executive Committee in September 2008. Planning is being facilitated by a team of experts from Executive Service Corps, which provides business consulting services tailored to the needs of not-for-profit organizations.

During an extended period of research, the Strategic Planning Committee examined the missions, activities, resources, and accomplishments of more than a dozen Boston institutions with which the Society competes for donors and earned revenues. The Committee observed that other organizations had missions and activities that are more focused than the Society's, which made them more effective in pursuing their goals. Committee members also worked with the Society's staff to assess all major aspects of the Society's internal operations, activities, and finances. Unfortunately, it was clear that, while the Society's staff is highly talented and functions at high professional levels, resources were spread far too thin in most cases.

In examining community trends and the needs of the Society's intended audiences, the Committee noted a significant growth in tourism in recent years, fueled by a weak U.S. dollar, with Boston emerging as a prime destination for European visitors. The Committee also observed a growing consensus among the city's historical institutions and sites that the Freedom Trail, at 50 years old, needs to be re-imagined if it is to continue to serve as a driving engine of Boston's vital heritage tourism economy. Moreover, this consensus has fostered a new willingness to cooperate with the Society on joint fundraising and program ventures. The Committee's analysis also revealed an unfilled need to provide researchers and the public with connections to, and between, historic materials and information held in various repositories, so that coherent pictures and narratives about Boston's history may be formed. The Committee has agreed that these trends offer significant opportunities for the Society to utilize its resources—the OSH in particular—in new and cogent ways.

Based on its research and analysis, the Strategic Planning Committee is recommending the following broad strategic framework to the Society's board of directors:

- 1) The Society should concentrate its efforts and resources on the OSH and the Revolutionary period, where the Committee believes the Society can perform with true excellence. This will support the Society's reinterpretation work on the OSH, encompassing programs, exhibitions, and educational activities related to the period in the mid-eighteenth century upon which the OSH will be focused. Associated research will complement the areas of concentration of other Freedom Trail sites, with which the Society might seek to collaborate more intensively.
- 2) The Society should direct major efforts toward the development of a Revolutionary Boston consortium, with which it might not only organize collaborative programs, but pursue joint fund-raising, arrange common support functions, and possibly seek to develop a joint facility for programs, offices, storage, and galleries. The Committee believes that this direction could be pursued as a sub-strategy that would be consistent with its work on the OSH.
- 3) In order to concentrate its full efforts to this work, the Committee believes the Society will need to focus its library and museum collections primarily on 18<sup>th</sup> century Boston materials, and make greater use of its library books and archives as internal research resources for a history department. A continuous assessment should be made of how general information for the public and students, as well as primary source materials for scholars, should be disseminated through new media.

Through the strategic planning process, the Society is re-affirming its commitment to providing quality public history, and to furthering its transformation to a fully professional historical organization prepared to meet the needs and expectations of 21<sup>st</sup>-century audiences.

### **Investing in Institutional Capacity**

The work of the Strategic Planning Committee, and the work underway on the OSH, point to a dual need that must be met if the Society is to achieve the strategic goals outlined above: 1) historical research that will support the development of a new interpretation for the OSH; and 2) expertise that will provide scholars and the public with the information and tools that will enable them to make sense of Boston's rich and complex history during the 18th century.

The Society has determined that the most effective way to meet these needs is to expand its permanent staff to include a Director of Public History and an Archivist, consistent with a strategic effort over the past several years to fully professionalize the organization's staff and operations. The addition of a senior-level historian in the role of Director of Public History is particularly crucial to fill a long-standing gap in the Society's staffing that has limited its ability to fulfill its mission. The job titles for this type of role may vary, from curator to librarian to director, but historical institutions across the country—particularly those representing major historical centers such as Boston—can claim at least one senior-level, credentialed historian among their staff. The Bostonian Society currently is an exception that proves the rule.

### **Identifying and Serving Intended Audiences**

In their seminal 1998 study *The Presence of the Past: Popular Uses of History in American Life*, Roy Rosenzweig and David Thelen found that Americans of all ages and backgrounds trust the history presented by museums more than any other source, including high school and college history courses. The Bostonian Society is committed to providing solid, well-researched historical interpretation that will merit that trust. Along with providing planning support, the proposed staff additions will help bolster public trust and expand the Society's ability to serve the following key audiences, each with different but related needs:

1. Visitors to the OSH. These visitors, primarily tourists, have a vague notion that they should learn about the American Revolution when in Boston, but they need a lot of guidance in order to derive meaningful, quality historical experiences during their brief stays in the city. A 2007 survey conducted by the Society revealed that tourists seek an authentic experience above all else—to learn things not included in textbooks, and to stand in the actual spot where the events of the past unfolded. But the same study found that tourists come to Boston knowing next to nothing about the American Revolution beyond a vague familiarity with John Adams and John Hancock, the Boston Massacre and the Tea Party. Boston's historical sites, including the OSH Museum, are competing with for-profit heritage tourism businesses—trolley and duck boat tours, and costumed walking-tour companies, some presenting unreliable historical interpretation—to provide these historical experiences. Tourists need the city's historical sites to provide quality history that they can trust.
2. Scholars. Researchers and scholars need access to the primary resources held in the Society's collections, but they also need someone to help them translate their work into something useful for a general audience. In addition, the Society believes it can play an important role in convening scholars to develop new, comprehensive approaches to the history of Boston and the Revolution. For example, a goal of the *Mapping Revolutionary Boston* project is to bring together multiple scholars, each focused in their own work on a different piece of the story, to create a 360-degree view of Boston during this era. Through its early planning efforts to re-interpret the OSH, as well as other projects, the Society has developed some very important relationships with scholars. All of these individuals are acutely interested in public perceptions of history, and some even have experimented with their own public history projects. But more and deeper connections need to be made if the potential for mutually beneficial collaboration is to be realized.
3. Individuals with questions about the OSH or Revolutionary Boston. These audiences include schoolchildren working on History Day projects, Boston businesses creating historical displays in lobbies and on websites, television producers from abroad, newspaper reporters, and genealogists and amateur historians from Maine to Iowa. Sometimes they have very specific questions about items in the Society's collection, or easy-to-find dates and facts. But often they have much more complex questions that can't be answered by one source; questions that require synthesis, interpretation, and sound historical judgment. At the moment, the Society can only point them to a list of books, maps, and manuscripts in the collection that might hold the answers being sought. While this has proven to be a valuable, sought-after service, members of the public come to the Society for more. They trust historical organizations, such as the Society, to guide them through the raw material—primary or secondary—and help them separate sound history from hogwash. Indeed, the public servant inside each staff member badly wants to provide this guidance.

The Society recognizes that it currently does not adequately meet the needs of these audiences. In fact, as suggested in the strategic recommendations above, the Society aims to go beyond “adequate” and provide public history at a level of true excellence. The addition of a public historian and an archivist is a critical first step toward raising the quality of the work the organization pursues on a daily basis.

## **PROJECT DESIGN**

### **Project Activities and Overall Goals**

As discussed above, the main goal of this project is to increase the overall quality of the Society's public history activities. To facilitate internal research and improved responses to research requests from scholars and the public, the Society proposes to expand its permanent staff to include a Director of Public History and an Archivist, seed funding for which is sought from IMLS. Job descriptions and hiring criteria for these positions have been developed (see Key Project Staff and Resumes document). With the Society focused almost exclusively on transforming the OSH over the next five years, these two positions will be expected to contribute

substantially to the efforts underway to create a new interpretation for the site. It is estimated that 75% of the Director of Public History's time, and 50% of the Archivist's time, will be devoted to the OSH.

The overarching goal of the OSH interpretive planning project is to develop new exhibitions that: 1) tell a clear and powerful story; 2) use techniques for active participation to capture visitors' attention and draw them into what might otherwise be abstract (and even boring) political history; and 3) provide visitors with the story they come for—one that explains why the OSH is so important, and frames it against the backdrop of a turbulent Boston during the buildup to revolution. During the next two years, the Society hopes to conduct the historical research that will form the backbone of the project, develop an exhibition treatment and subsequent exhibition text, begin work on an OSH catalogue, secure an exhibition design firm and a multimedia consultant, and begin planning educational programs. Input from the Director of Public History will be essential to all of these activities. In addition to efforts at the OSH, the Director of Public History will be expected to shape and lead the public history initiatives of the Society as a whole. Key duties during the grant period will include:

- Conducting research and planning for the re-interpretation of the OSH and the *Mapping Revolutionary Boston* project;
- Forming a network of academic and public historians to increase the level of scholarship on Boston during the American Revolution through symposia, publications, and other projects;
- Developing a five-year plan for public history that will facilitate implementation of the Society's new strategic vision;
- Developing methods of assessing the quality of the public history provided by the Society.

This project also is intended to facilitate the vision for the library outlined in the new strategic plan, which is to provide quality research services consonant with the Society's capacity and competencies. In focusing the library on the 18<sup>th</sup>-century, it is the Society's goal to limit its scope so that it may provide core services at the highest possible levels of excellence. This means making materials related to the 18<sup>th</sup> century fully accessible and providing reference services that meet patron expectations. For example, the manuscript collections currently are accessible online at the collection level; the next logical step will be to digitize them at the item level. Similarly, the Society might experiment with the creation of subject-specific databases and other kinds of online content in order to provide more information to researchers and the public in formats they find useful. Consequently, the Archivist will serve as a coordinator of digitization projects and will work with the public online, rather than staffing a reading room on a full-time basis, as has been expected of past library staff. Other library functions, acquisitions and preservation in particular, will be reassigned to the Society's Collections Manager. The key objectives to be accomplished by the Archivist during the grant period include:

- Providing public and internal access to the Society's archival holdings; particularly in response to research requests;
- Developing online resources for scholars, researchers, and the general public;
- Supporting the Director of Public History on research and programming, particularly the new interpretation of the OSH and *Mapping Revolutionary Boston*;
- Assisting with articles and publications on the OSH and Boston during the Revolutionary Era.

If awarded a *Museums for America* grant, the Society will advertise the Director of Public History position with the National Council on Public History, the American Association for State and Local History, the New England Museum Association, and the Massachusetts Studies Network. The Archivist position will be posted with New England Archivists, the Massachusetts Board of Library Commissioners, and Simmons College Graduate School of Library and Information Science. Applicants will be screened by the Society's Director of Finance and Administration and the Director of the OSH Museum. The Society seeks to attract creative thinkers who recognize the emerging possibilities in the field of public history, are committed to public service, and

have experience with new technology. The top three candidates will be invited for interviews with the Executive Director and with other key members of the Society's staff. After selections are made, the grant is intended to cover a full 24 months of work by these two positions.

### **Project Management and Mid-Course Redirection**

Like all other members of the Society's staff, both of these individuals will collaborate with their immediate supervisors to create annual work plans. These plans will establish performance objectives and benchmarks for each year of the grant period. Following the Society's established personnel procedures, each of these individuals will receive performance evaluations at six months after their hiring, and then annually thereafter. Performance evaluations will be based on the accomplishment of objectives outlined in each individual's work plan, and offer an opportunity to adjust the plan to ensure that each is achieving his/her goals. The Director of Public History will meet one-on-one with the Executive Director on a bi-weekly basis to review progress, solve problems, and ensure that s/he is successfully balancing his/her responsibilities toward the OSH re-interpretation with overall duties to the Society. The job description for each of these positions will be adjusted as necessary at the end of the first year of the grant period.

During their initial months on the job, the Director of Public History and the Archivist will create systems to facilitate the Society's public history priorities. This will include creating a research plan for OSH re-interpretation, developing a system to respond to internal requests for research and review of programming, improving the existing system for reference requests, and creating a strategy for handling fact-checking and historical inquiries from the press. After these systems are in place, both individuals will undertake the remaining tasks outlined above.

In addition to conducting their own research on the OSH, the Director of Public History and Archivist will work to build relationships with scholars studying Boston and the American Revolution. The Director of Public History will seek to engage the scholars and curators who participated in the Society's 2007 NEH consultation grant to form the base of a scholarly advisory committee for the OSH, supplementing as necessary with scholarly expertise from local historical institutions. The Director of Public History will be liaison to this group, which will be convened periodically to review successive stages of research and planning for the OSH. It is expected that at least one scholarly symposium will be organized, probably in the fall of 2010, with input from the advisory committee. Advisory committee members also will be asked to contribute to the catalogue that will be produced in conjunction with the new interpretation.

During the second year of the project, the Director of Public History will be expected to create a five-year plan for public history for the Society. This plan will dovetail with the Society's overall strategic plan, and will map out the steps and resources needed to respond to the strategic plan's core goals for delivering quality public history, including enhancing the accessibility of the Society's library holdings. This five-year plan is seen as an essential step in building the Society's long-term institutional capacity.

### **Project Evaluation**

Because this project is primarily intended to improve the quality of the public history the Society provides, the principal means of assessing the impact of these two positions will be to survey users and patrons on an ongoing basis. In addition to the regular staff performance reviews outlined above, the Director of Public History will be charged with establishing a baseline for measuring institutional performance, and developing assessment tools targeted to the Society's various audiences. Specifically, the Society wishes to gather the input of the scholars it serves, and its library patrons, so that it may make continuous improvements. Reality dictates, however, that visitors to the OSH will be excluded from this process, even though they are one of the Society's primary audiences, as the new interpretation will not be completed until several years after the grant period. The following benchmarks will be used to measure progress in planning the new OSH interpretation during the grant

period: 1) completion of a research plan and an exhibition treatment; 2) completion of outline for the OSH catalogue and assignment of essays; and 3) convening of advisory committee and a scholarly symposium.

### **PROJECT RESOURCES: Time, Personnel, Budget**

The Society envisions a 28-month project, beginning in September 2009 with the process of hiring a Director of Public History and an Archivist; the goal will be to fill these positions by the end of 2009. By the end of the grant period, in December 2011, the Society intends to secure funding for the implementation phase of the OSH interpretation, and expects to continue to fund these two positions through restricted funds during this phase. Then, when the transformed OSH opens in 2013, the Society expects to have increased institutional capacity to the point where these two positions can be funded permanently through general operating support.

The Director of Public History will report to the Executive Director Brian LeMay, and will be a key member of the Society's senior staff. He/she will supervise the Archivist. A particularly strong working relationship will be formed with Rainey Tisdale, Director of the OSH Museum, who already is a key participant in planning for the new OSH interpretation. Ms. Tisdale will serve as project manager for the new interpretation, and also will be the project manager for the *Museums for America* grant. She will collaborate closely with the Director of Public History, who will serve as curator for the new interpretation, providing content for the new exhibitions to be installed in the OSH. The Director of Public History also will chair the exhibition team, which will comprise an exhibition designer, an educator, and the project manager (the Society currently is seeking support from other sources for other aspects of the planning process). The Director of Public History and the Archivist also will work closely with other key staff members—the Public Programs Manager, Visitor Services Manager, and Collections Manager in particular—to provide quality content for the OSH and all of the Society's programs.

The Society will seek funding to match the *Museums for America* grant from a local family foundation that has supported the institution generously in the past and has indicated a willingness to contribute matching funds on a case-by-case basis. Total project funding of \$300,000 will enable the Society to fund two positions for two years, and also provide a modest budget to pay honoraria to contributing scholars, to engage IT consultants regarding online resources, to organize at least one symposium, and to cover costs for off-site research.

The Society has recent, significant experience managing multi-million dollar projects: both of the phases of OSH stabilization, in 2006 and 2008, were completed on time and within budget. The Society has financial systems and controls in place that are closely monitored by a full-time, professional Director of Finance and a board-level Finance Committee. Through prudent management, the Society operated at a break-even level or with a slight budget surplus in each of the four previous fiscal cycles.

### **IMPACT**

It is hoped that by the end of the grant period, in December 2011, substantial progress will have been made on research and planning for the OSH interpretation, strong relationships with scholars will have been cultivated, the Society's effectiveness at providing reference services will have improved, a five-year plan will be in place to govern the Society's historical work, and consequently, the overall quality of the history presented by the Society will have increased significantly.

The long-term impact of this project will be a significant enhancement of the internal capacity needed to realize the Society's vision for the OSH over the next five years. Hiring the permanent staff customarily associated with an historical organization will enhance the Society's credibility as a trusted public interpreter, and in turn its ability to attract the financial support needed to fully implement the OSH master plan. The Society's future, and the fulfillment of its strategic vision, will be rooted in its ability to transform the public experience of the OSH. IMLS support for this project will help bridge a critical gap in The Bostonian Society's ability to accomplish its mission, now and in the future.

**BUDGET FORM: Section B, Summary Budget**

	\$ IMLS	\$ Cost Share	\$ TOTAL COSTS
1. Salaries and Wages	\$109,620.00	\$109,620.00	\$219,240.00
2. Fringe Benefits	\$23,568.00	\$23,568.00	\$47,136.00
3. Consultant Fees	\$11,000.00	\$11,000.00	\$22,000.00
4. Travel	\$4,100.00	\$4,100.00	\$8,200.00
5. Supplies and Materials	\$1,500.00	\$1,500.00	\$3,000.00
6. Services			
7. Student Support			
8. Other Costs	\$450.00	\$450.00	\$900.00
<b>TOTAL DIRECT COSTS (1-8)</b>	<b>\$150,238.00</b>	<b>\$150,238.00</b>	<b>\$300,476.00</b>
9. Indirect Costs			
<b>TOTAL COSTS (Direct and Indirect)</b>	<b>\$150,238.00</b>	<b>\$150,238.00</b>	<b>\$300,476.00</b>

**Project Funding for the Entire Grant Period**

1. Grant Funds Requested from IMLS	<b>\$150,000.00</b>
2. Cost Sharing:	
a. Applicant's Contribution	<b>\$150,476.00</b>
b. Kind Contribution	
c. Other Federal Agencies*	
d. TOTAL COST SHARING	<b>\$150,476.00</b>
3. TOTAL PROJECT FUNDING (1+2d)	\$300,476.00
Percentage of total project costs requested from IMLS	<b>50 %</b>

\*If funding has been requested from another federal agency, indicate the agency's name:

**YEAR 1 (September 1, 2009 – December 31, 2010)**

- September 1, 2009: Project start date
- September 15, 2009: Post job openings for Director of Public History and Archivist
- October 2009: Conduct interviews
- November 2009: Make final selections from candidates
- December 2009: **New hires start work**
- January 2010: Director of Public History creates research plan for Old State House re-interpretation
- January 2010: Director of Public History and Archivist put systems in place for managing internal and external requests for information and review, as well as assessing quality of services through user surveys
- January 2010: Director of Public History joins *Mapping Revolutionary Boston* team
- Spring 2010: Old State House scholarly advisory committee is formed
- June 2010: Six-month performance review for both positions
- Summer 2010: Director of Public History and Director of Old State House begin developing exhibition treatment for new Old State House interpretation
- Summer 2010: Archivist assesses the current online resources for researchers and, with input from the Director of Public History, begins making recommendations for improving services
- Fall 2010: Hold scholarly symposium on 18<sup>th</sup>-century Boston
- Fall 2010: Director of Public History participates in search for full-time, veteran educator to work on Old State House project and other institutional needs
- December 2010: Annual performance reviews for all Society staff, including Director of Public History and Archivist

**YEAR 2 (January 1, 2011 – December 31, 2011)**

- Spring 2011: Send Old State House exhibition treatment out for review by scholarly advisory committee
- Spring 2011: Begin crafting five-year plan for public history
- Summer 2011: Begin work on Old State House catalogue
- Summer 2011: Begin work on Old State House exhibition script

- Fall 2011: Finish first draft of exhibition script and send to scholarly advisory committee
- Fall 2011: Analysis of progress made toward institutional goals as a result of the two positions, including compilation of user surveys
- December 2011: Annual performance reviews for all Society staff, including Director of Public History and Archivist
- December 2011: Project end date; write final grant report to IMLS