

# Developing History Leaders @SHA

## Class of 2017 Schedule & Session Descriptions

Max A. van Balgooy, Director • (301) 412-7940  
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All sessions occur in the Day Classroom of the Indiana Historical Society (450 West Ohio Street, Indianapolis; parking in rear; enter from the side facing the canal), unless otherwise noted. Some sessions require reading or preparation in advance. Saturday afternoons and Sundays are free days. This schedule is subject to change.

In the case of an emergency, if at all possible, the class should shelter in place. If the building that the class is in is affected, follow the evacuation procedures for the building. After evacuation, seek shelter at a predetermined rendezvous location.

### Week One: Challenges and Opportunities Facing History Organizations

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#### Saturday, October 28

- 3:00-6:00 pm Arrivals**  
Check-in to the Residence Inn Downtown on the Canal. Receive room assignment and information packet.
- 6:00 pm Informal Welcome to SHA and Indianapolis**  
Informal gathering of SHA Class of 2017, staff, and Partners.

#### Sunday, October 29

- 9:00-10:00 am Welcome**  
An introduction to SHA, its goals and major supporters, with rules of the road and logistical details. *Max A. van Balgooy*
- 10:00-11:30am Introductions**  
Time to get better acquainted with your colleagues. Each of you will have eight minutes (that's 8 minutes) to introduce yourself and your work in a memorable way. Visual aids are welcome (if you need to use AV technology, warn us in advance so we can prepare).
- 11:30-1:00 pm Lunch** (provided)
- 1:00-2:00 pm State of the Field**  
*Erin Carlson Mast, CEO & Executive Director, President Lincoln's Cottage, SHA 2008*  
Each year we invite a senior leader from the field of public history to address the class on major trends and issues facing history organizations today. How has the history field changed; what are the big issues now; what's coming next; and

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what's your role in leading change? Alumni and other leaders in the history field are welcome to attend.

**2:00-3:00 pm Getting the Most Out of SHA**

*Erin Carlson Mast, President Lincoln's Cottage, SHA 2008; Jessica Stavros, Development Officer for Historic Sites, Indiana State Museum and Historic Sites, SHA 2016*

**3:00-4:30 pm What's Where?**

We'll get acquainted with the Indiana Historical Society, its facilities, exhibitions, collections, and some of its staff on this walking tour. *Marianne Sheline, Program Specialist, Education and Exhibits, Indiana Historical Society*

**4:30-5:00 pm Closing**

Each day we'll close with a review of the sessions and identify which ideas might help our organizations work better or differently. *Usually Max A. van Balgooy with some exceptions.*

**6:00-8:00 pm Dinner**

Dinner together at local restaurant; separate checks.

### Monday, October 30

**8:30-9:00 am Getting Started**

I'll introduce the activities for the day and suggest how they relate to the week's topic. *Max A. van Balgooy*

**9:00-12 noon The Relevance of Public History – Part 1**

We will begin our work together with some fundamental questions. Do public history institutions—historical societies, history museums, historic sites, archives, preservation organization—play a meaningful role in the lives of people and communities, or do they simply supply a pleasant diversion for a relatively few individuals? How can we make history useful? What is our role, and how can we best serve our communities? *David Young, Executive Director, Cliveden of the National Trust; Tim Grove, Chief of Education, National Air and Space Museum, Smithsonian Institution*

**12:00-1:30 pm Lunch (provided)**

This is an opportunity to meet our hosts, the staff and board of the Indiana Historical Society. Get to know them, and throughout the next three weeks take advantage of their knowledge of both the history field and Indianapolis.

**1:30-4:30 pm The Relevance of Public History – Part II**

We continue to consider the relevance of our work with a discussion of the History Relevance Campaign. How can we shift the way we talk about history so that others readily see its value? How can we design programs, exhibits and engagements that have a positive impact on communities and individuals? How

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can we demonstrate that impact and make the case for history? *Tim Grove and David Young*

**4:30-5:00 pm Closing**

### Tuesday, October 31

**8:30-9:00 am Getting Started**

**9:00-12 noon Design Thinking**

Now more than ever, “T-shaped professionals” are in high demand for their ability to collaborate across disciplines, build relationships, and advance innovation. These contemporary workers are characterized by the possession of deep skills in a specialty as well as the knack for solving problems in other areas of expertise, allowing them to move beyond boundaries. The emerging field of Design Thinking responds to this paradigm shift as a human-centered approach to connecting the dots. *Pamela Napier, Assistant Professor of Visual Communication Design at Herron School of Art and Design at IUPUI and Cofounder and Design Strategist at Collabo Creative; Terri Wada, Cofounder, Design Strategist and President of Collabo Creative*

**12:00-1:00 pm Lunch (on your own)**

Recommended for your convenience: Farmers Market Café, Indiana State Museum

**1:00-1:30 pm Indiana State Museum**

An opportunity to meet the new President and CEO of the Indiana State Museum to discuss her future plans for the institution and the challenges faced by women in management. *Cathy Ferree, President and CEO, Indiana State Museum and Historic Sites*

**1:30-2:30 pm Collections Management**

The Indiana State Museum and Historic Sites stewards more than 500,000 cultural and natural history objects. We’ll see how their artifact collections are managed in a state-of-the-art facility, discuss how they are used across the entire 12-site system, and learn about their collecting strategies, including their coordination with the Indiana Historical Society. *Susannah Koerber, Chief Curator & Research Officer and Traci Cromwell, Director of Collections, Indiana State Museum and Historic Sites*

**2:30-3:00 pm Break and Walk to IHS**

**3:00-4:30 pm Conservation**

Conservation of collections is often a behind-the-scenes activity but not at the Indiana Historical Society. We’ll visit their conservation lab and learn how they’ve made the essential work of preservation more visible to the public.

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*Ramona Duncan-Huse, Senior Director, Conservation & Preservation Department, Indiana Historical Society*

**4:30-5:00 pm Closing**

### Wednesday, November 1

**8:30-9:00 am Getting Started**

**9:00-12 noon Using Dialogue to Connect Past to Present**

The International Coalition of Sites of Conscience is a worldwide network dedicated to transforming places that preserve the past into dynamic spaces that promote civic action on today's struggles for human rights and justice. More than 200 institutions across 55 nations form the Coalition, including more than seventy from the U.S. We will discuss and practice strategies to connect the past to the present, including proven techniques for developing questions and activities that help participants feel comfortable and know their input is valued. *Sarah Pharaon, Program Director, North America, International Coalition of Sites of Conscience*

**12:00-1:30 pm Lunch**

**1:30-4:30 pm Future of Interpretation**

We are storytellers - everyone loves a good story! Interpretation is how we communicate with the public. That includes websites, objects, exhibits, structures, furnishings, costuming, and landscapes. It is how we select, shape, and share our stories to attract and engage our audiences. This includes directors, curators, designers, educators, interpreters, and guides. We are all interpreters. We will hear a quick review of the evolution of interpretation, then learn where we are today and discuss "the end game" that makes interpretation such a powerful and memorable management tool. We will conclude with five obligations that museums and historic sites should achieve to be relevant in the future. *Margo Carlock, Executive Director and Jay Miller, President, National Association for Interpretation*

**4:30-5:00 pm Preparing for the Field Trip to Conner Prairie**

*Ellen Paulin, Manager of Interpretation, Conner Prairie, SHA 2016*

### Thursday, November 2

**8:00-8:45 am Travel (bus)**

**8:45-9:00 am Break**

**9:00-12 noon Conner Prairie I**

This is a full day at Conner Prairie, one of the most visited outdoor museums in the country whose mission is that "very guest has the opportunity to pursue knowledge and fun in a way that is tailored to them." We'll see how they've

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pursued this goal by discussing organizational change, the evolution of programs, and historical thinking. Conner Prairie closed for the season on October 29, however, they're opening a few places especially for SHA so we can experience them. *Norman Burns, President and CEO, SHA 1991; Catherine Hughes, Director of Interpretation and Evaluation; Ellen Paulin; John Herbst*

**12:00-12:30pm Lunch** (provided)

**12:30-3:00 pm Conner Prairie II**

**3:00-5:00 pm Interpreting Race and Racism**

The interpretation of difficult or sensitive issues is growing in importance in the history field. Using race and racism as a topic, we will survey current developments in the field and discuss how they expand our thinking about history and culture. *Richard Josey, Manager of Programs, Minnesota Historical Society, SHA 2008*

**5:00-5:30 pm Break**

**5:30-6:00 pm Dinner** (provided)

**6:00-8:00 pm Follow the North Star**

“Follow the North Star” is an award-winning, participatory museum theater experience that demonstrates the wide ranging social attitudes toward African-Americans in pre-Civil War Indiana. It is an immersive, museum theater program where participants assume the role of escaped slaves who encounter a variety of characters, from sympathetic allies to racist antagonists, and concludes with a dialogue about slavery. The experience can be intense and participants may encounter noises, actions, and language that could be offensive and disturbing, however, no physical contact occurs and participants may opt out at any time during the program. Since its creation 20 years ago, more than 80,000 people, including the general public and school groups of students ages 12 and older, have experienced the program, which has received an award for excellence in programming from the American Alliance of Museums and an award of merit from the American Association for State and Local History.

**8:00 pm Travel** (bus)

### **Friday, November 3**

**8:30-9:00 am Getting Started**

**9:00-12 noon Saving Living History**

Preserving and advocating for authentic historic places offers a wide range of challenges and opportunities. We'll hear about what's happening now in Indiana and how museums and historic sites can be involved in advocacy (or historic preservation in general) as well as trends they envision in the U.S. from one of the

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strongest historic preservation organizations in the nation. *Todd Zeiger, Director, Northern Regional Office, Indiana Landmarks*

**12:00-1:30 pm Lunch**

**1:30-4:30 pm Transforming the Experience of Objects**

In this era of change and innovation, the ways in which we collect, manage and use historical collections are changing. We will engage in discussion with two people who are leading this change, addressing fundamental questions concerning what we collect, how to gain intellectual control of what we have, and how to best use artifacts to engage others in meaningful and relevant history. *Trevor Jones, Executive Director and CEO, Nebraska State Historical Society, SHA 2009; Elee Wood, Associate Dean for Student Affairs, Indiana University School of Liberal Arts*

**4:30-5:00 pm Closing**

### Saturday, November 4

**8:30-9:00 am Weekly Exploration and Application**

At the end of each week, we'll choose three topics to explore based on the week's sessions and experiences, and discuss how they might apply to the management of history organizations. Each topic will be facilitated by a different class participant.

**9:00-10:00 am Discussion Topic 1**

**10:00-11:00am Discussion Topic 2**

**11:00 am-12 n Discussion Topic 3**

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### Week Two: Challenges and Opportunities Facing Leaders

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#### Monday, November 6

**8:30-9:00 am Getting Started**

**9:00-12 noon Nonprofit Financial Management**

You are probably not an accountant or a financial analyst, and yet, you're responsible for managing your organization's finances. This session will identify the basic principles for nonprofit organizations based upon Becky's new book, *Financial Fundamentals for Historic House Museums* (Rowman and Littlefield, 2017). *Becky Beaulieu, Associate Director, Bowdoin College Museum of Art*

**12:00-1:30 pm Lunch**

**1:30-4:30 pm Revenue Models and Financial Sustainability**

Faced with mounting and rapidly changing economic challenges, history leaders are developing new revenue models in order to build sustainable institutions. Through a fictional case study, we will develop a new revenue model for an institution that has for many years been unable to meet its stewardship obligations with available resources. *Larry Yerdon, President, Strawberry Banke Museum*

**4:30-5:00 pm Closing**

#### Tuesday, November 7

**8:30-9:00 am Getting Started**

**9:00-12 noon Staff and Boards I**

Leaders, especially at the executive director and board chair level, want to create a working team. The challenge is figuring out how to do this in an era when "professionals want to feel like volunteers and volunteers want to feel like professionals." This day-long session will examine how you can build a new dimension of performance with your board and your staff, whether paid or volunteer, using ideas from the leading thinkers in management. We'll tackle some of your experiences and see how they can be used to build effective teams and a healthy organization. *Kent Whitworth, Executive Director, Kentucky Historical Society; Jim Vaughan, Executive Director, Pennsylvania Historical and Museum Commission (recently retired), SHA 1982*

**12:00-1:30 pm Lunch**

**1:30-4:30 pm Staff and Boards II**

*Jim Vaughan; Kent Whitworth*

**4:30-5:00 pm Closing**

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**5:00-5:30 pm** **Travel to Plow Digital** (212 West 10th Street, Suite F175, Indianapolis)

**5:30-7:30 pm** **Plow Digital | Plow Games**

This is an optional activity for those interested in the latest uses of digital technologies. We will visit Plow Digital, a hip group with creative ideas and high tech tools that the Indiana Historical Society has used to engage visitors in innovative ways. *Greg Philips, Owner*

### Wednesday, November 8

**8:30-9:00 am** **Getting Started**

**9:00-12 noon** **Achieving Impact through Intentional Practice**

Randi Korn will discuss the need for and purpose of Intentional Practice in museums. Intentional Practice is when a museum continually clarifies its intended impact on audiences, evaluates its effectiveness according to what it hopes to achieve, reflects on evaluation results, and realigns its practices and resources so the museum achieves greater impact. She will make a case for balancing mission-driven planning with impact-driven planning—a necessity for museums that are interested in pursuing and achieving impact. An organization that is intentional in its practice has an inclusive, process-oriented infrastructure that promotes continuous learning opportunities for all staff while also achieving impact in its community. The morning will include exercises that Randi uses with museums to clarify a museum's intended impact—exercises that participants can take back to their organizations and implement with their boards and staff. *Randi Korn, Intentional Practice Leader and Founding Director of Randi Korn & Associates*

**12:00-1:30 pm** **Lunch**

**1:30-2:30 pm** **Funder's Perspective**

Effective fundraising isn't just about writing stronger proposals. By seeing your work from the funder's perspective, it will give you a new insight into the purpose and impact of your organization. With assets of nearly \$12 billion, the Lilly Endowment has generously supported historical and cultural organizations for decades and they've agreed to share an insider's perspective on the granting process, the common challenges and weaknesses of proposals, and the trends and directions in philanthropy. *Ronni Kloth, Program Director, Community Development, Lilly Endowment Inc.*

**2:30-5:30 pm** **Fundraising**

Today's history leaders need proven fundraising skills that not only sustain their organization's mission, but also realize their strategic goals and future vision. Most learn these skills on the job, coupled with other unrelated responsibilities. Explore practical ways to dedicate the appropriate amount of time to fundraising, with the right prospects, to elevate your organization's fundraising program. *Jenny Burch, President and CEO, Knight Ridge Consulting*

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### Thursday, November 9

**8:30-9:00 am** Thoughts on Yesterday's Sessions?

**9:00-9:30 am** Getting Started

**9:30-10:00 am** Travel (bus)

**10:00-12:30pm** "The Power of Children"

This exhibit provides families with an environment in which to discuss racism, prejudice, and discrimination. Using artifacts, interactive displays, video, and live dramatic performance, it presents the stories of three children in the 20th century. We will tour the exhibit and meet with staff to discuss challenges they faced in taking on sensitive topics. *Jennifer Pace Robinson, Vice President for Experience Development, Children's Museum of Indianapolis*

**12:30-1:00 pm** Lunch (on your own)

**1:00-1:30 pm** Explore Museum (on your own)

**1:30-2:00 pm** Travel (bus)

**2:00-4:30 pm** Indiana Medical History Museum

We will tour the museum, learn about its history and current programs, and engage in an assessment and discussion of its strengths, weaknesses, opportunities, and threats. *Sarah Halter, Executive Director, Indiana Medical History Museum, SHA 2017*

**4:30-5:00 pm** Closing

**5:00 pm** Travel (bus)

### Friday, November 10

**8:30-9:00 am** Getting Started

**9:00-12 noon** Leadership and Decolonizing Museum Practice

The Abbe Museum, operating from two locations in Bar Harbor, Maine, has the mission to inspire new learning about the Wabanaki Nations with every visit. In August 2015, the museum completed its most ambitious strategic plan to date, committing to develop and implement decolonizing practices in a museum setting. We will discuss that nature of decolonizing museum practice and how it offers opportunities for Wabanaki people to feel connected to the Abbe, promote cultural authority, and encourage collaboration and involvement with and between tribal community members and the museum field. The role of the leader in a decolonizing framework requires power-sharing skills and a commitment to

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developing group and person cultural competencies. *Cinnamon Catlin-Legutko, President and CEO, Abbe Museum, SHA 2004*

**12:00-1:30 pm Lunch**

**1:30-4:30 pm Diversity and Inclusion**

According to AASLH's Diversity and Inclusion Statement, "Everyone makes history. Relevant history is inclusive history." History organizations hope to be diverse, but how should it be achieved in the field or at your institution? While there are many types of diversity, what does inclusion mean for different races and ethnicities, gender and sexual identity, political perspectives, physical and mental abilities, age, education, employment experiences, or geographic location? What's appropriate, what's merely window-dressing, what's interfering, what's incongruous? *Ken Turino, Manager of Exhibitions and Community Engagement, Historic New England, SHA 1983*

**4:30-5:00 pm Closing**

### Saturday, November 11

**8:30-9:00 am Weekly Exploration and Application**

**9:00-10:00 am Discussion Topic 1**

**10:00-11:00am Discussion Topic 2**

**11:00 am-12 n Discussion Topic 3**

### Saturday, November 11

**5:00 pm Indiana Pacers vs Houston Rockets.**

This is an optional activity and we have a limited number of complimentary tickets available on a first-come, first-served basis. We'll meet in the lobby of the Residence Inn and walk to the Bankers Life Fieldhouse for the start of the game at 6:00 pm.

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### Week Three: Strategic Thinking

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#### Monday, November 13

**8:30-9:00 am Getting Started**

**9:00-12 noon Strategic Thinking & Managing Change I**

Historical organizations need to think strategically about how to best serve their communities, develop the capacity to do that work, and use their resources. Changes in strategy often necessitate organizational or departmental change. Understanding the organizational and personal implications of change are necessary preparations for dealing with the discomfort and disruption as well as the energy and enthusiasm that accompany institutional change. *Barbara Franco, Founding Director Emerita, Gettysburg Seminary Ridge Museum, SHA; Laura Roberts, Principal, Roberts Consulting*

**12:00-1:30 pm Lunch**

**1:30-4:30 pm Strategic Thinking & Managing Change II**

*Laura Roberts; Barbara Franco*

**4:30-5:00 pm Closing**

#### Tuesday, November 14

**8:30-9:00 am Getting Started**

**9:00-10:00 am Advocating for Government Support**

Learn how to make the case for history to elected officials and local governments from a former member of the Indiana House of Representatives and a current member of the Indiana Historical Society. *Michael B. Murphy, Senior Vice President, Hiron*

**10:00-12 noon Prioritizing Managerial Challenges**

We will delve into a case study of ongoing change at our host institution. We will learn about new strategies and programmatic directions, and discuss the challenges of managing the change process. *John Herbst, President and CEO, Indiana Historical Society*

**12:00-1:30 pm Lunch**

**1:30-4:30 pm Measuring What Matters I**

We're coming up to the end of SHA and you are probably bursting with ideas. How do you choose which ones will have the greatest impact? In this session, we'll learn how to define impact and use evaluation to measure its effect on your visitors or program participants. Theory will be put into practice as we work in

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teams to design an evaluation of an experience at one of your institutions. *Conny Graft, Principal, Conny Graft Research and Evaluation*

**4:30-5:00 pm**    **Closing**

**5:00-5:30 pm**    **Travel** (Carpools)

**5:30-6:00 pm**    **Reception and Dinner**

**6:00-7:30 pm**    **Benjamin Harrison Presidential Site**

We'll enjoy a reception at the home of President Harrison, the only U.S. President elected from the State of Indiana. We'll not only tour the house, but learn about their efforts to become "the most innovative, impactful and civically-engaged presidential site in the United States within the next 5 years". *Charles Hyde, President and CEO, Benjamin Harrison Presidential Site*

**7:30 pm**            **Travel** (Carpools)

#### Wednesday, November 15

**8:30-9:00 am**    **Getting Started**

**9:00-12 noon**    **Measuring What Matters II**

*Conny Graft*

**12:00-1:30 pm**    **Lunch**

**1:30-2:30 pm**    **Staying Sharp Professionally**

SHA has sharpened your mind but how can you stay sharp in the years ahead? We'll explore many of the ways that you can maintain your edge, as well as build a stronger history profession. *Matthew Toland, Executive Director, International Preservation Studies Center, SHA 2016*

**2:30-4:00 pm**    **Applying SHA to Your Organization**

*Matt Toland; Max van Balgooy*

**4:00 pm**            **Closing**

**4:30 pm**            **Class Photo**

#### Thursday, November 16

**8:30-9:00 am**    **Getting Started**

**9:00-12 noon**    **Leading from the Middle I**

By this time, you have begun to develop your own ideas of how your own institution should change. What are some strategies for leading change when you are not in a position of authority? How can you gain the support of your executive

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director or supervisor, or your board for those of you who direct smaller organizations? The session will include a guided discussion about your plans for going home and returning to the office. This session will help you deal, conceptually and emotionally, with balancing life and work, with setting priorities and managing your time, and with leading and managing successfully in the months and years ahead. *Julie Johnson, Co-Founder and Owner, J2R2 Leadership and Change Associates LLC*

**12:00-1:30 pm Lunch**

**1:30-4:30 pm Leading from the Middle II**  
*Julie Johnson*

**4:30-5:00 pm Closing**

**5:30-? pm Festival of Trees**  
Get ready for the holidays with the History Center's annual Festival of Trees. It's an optional event, but you find dozens of decorated trees, music, crafts, and perhaps even a vintage Santa.

#### **Friday, November 17**

**8:30-9:00 am Getting Started**

**9:00-10:00 am Weekly Review**

**10:00-12:00 n Parting Thoughts**  
With representatives of SHA's sponsoring institutions sitting with us, share your thoughts and comments on your three weeks in Indianapolis attending SHA. Also discuss how you might put newly acquired ideas and skills to work, maintain friendship and connections made during the seminar, and your readiness to address some big issues you left behind at your institution or perhaps take on some newer, bigger challenges in the field.

**12:00-1:00 Lunch** (provided)  
SHA Partners and Alumni invited

**1:00-1:30 pm Graduation**  
*John Dichtl, President and CEO, American Association for State and Local History, SHA 2004*

**4:00 pm Closing Party**  
The spotlight is now on you, Class of 2017, as you celebrate your time together at SHA with an event you been planning just for this occasion.

#### **Saturday, November 18**

**Departures and Good Byes!**