AASLH
TECHNICALLEAFLETBUNDLE
A PUBLICATION OF THE AMERICAN ASSOCIATION FOR STATE AND LOCAL HISTORY

Programs for Teachers and Students

BNDL008

Many mission statements and grant opportunities emphasize the importance of helping our communities learn about the past. Working with educational institutions is an excellent way to accomplish this. How will your organization reach out to teachers and students? This technical leaflet bundle offers suggestions from a few people who have executed successful programs in the past. From teacher institutes, to field trips, to hands on activities: this bundle offers practical guidance that can be immediately useful and ideas that can change the future direction of your educational outreach and programs. Take advantage of this opportunity to add a cost-effective resource to your reference library that you will actually use.

This bundle may help institutions achieve the standards as set forth under Mission, Vision and Governance, Interpretation, and the Stewardship of Collections section of the AASLH StEPS Program.

AASLH
TECHNICAL LEAFLET #235
A PUBLICATION OF THE AMERICAN ASSOCIATION FOR STATE AND LOCAL HISTORY

Reaching Teachers: Marketing Museum Education in the Twenty-First Century

By Cindy Lucas

In the twenty-first century, most museums place a high priority on education. With current issues of testing and transportation, marketing education programs is more important than ever. Museums must be creative in their approach to marketing their programs to teachers. The ability to reach teachers, sell the museum product, and bring teachers and students in the door requires customer service at the highest level possible.

As museums plan programs, attention to the needs and ideas of learners continues to be crucial to the planning process. The twenty-first century brings another component critical to the planning process—attention to the needs of the teachers. Museums must include in their marketing focus how a visit to the museum can help the teacher met his or her needs. These needs might include providing the teacher with State Standards of Learning components within the lessons taught at the museum, providing avenues to meet state educational mandates, or fulfilling a requirement associated with the No Child Left Behind Act.

With increased competition for education programs, marketing is an essential element of the entire planning process for a museum's education programs. Teachers participate voluntarily in museum education programs. To successfully market programs to schools, museums must provide exceptional customer service to teachers and students. This includes exchanging products, services, and knowledge that is of value to the museum, the teachers, and the students.

The Doak House Museum, a small historic house in eastern Tennessee, set the course for a clear, simple, and manageable marketing procedure that allowed the museum's school audience to grow successfully over the past ten years.

Doak House Museum, Tusculum, Tennessee

The Doak House Museum, located on the west end of the Tusculum College campus in Tusculum, Tennessee, sixty miles north of Knoxville, was the home of Reverend Samuel Witherspoon Doak, his wife Sarah, and their thirteen children. In 1818, Reverend Doak and his son, both Presbyterian ministers, founded Tusculum Academy. At his home, Reverend Doak farmed the land, served as minister of two local churches, and taught at the academy. Reverend Doak's account books reflect his simple, but ever-demanding life in Tusculum. Students from Tennessee and as far away as Virginia and Pennsylvania attended his school. Some lived with the family while others commuted by horse or on foot. Rev. Doak only accepted students of "good moral character" to his school. Students unable to pay with cash could barter with goods such as corn, apples, vinegar, horses, or saddles for their tuition. This small academy, in the foothills of the Smoky Mountains, became a full college in 1844. It merged with Greeneville College in 1868 and was known as Greeneville and Tusculum College. The college dropped the name Greeneville in the early twentieth century.


Doak House Museum, Tusculum, TN.

The Doak House Museum, with its wonderful story of a family, religion, education, and material culture, decided it was time to develop a plan of how the museum should share its story with the public. The steps outlined below allowed the museum to create a very successful education program that continues to grow in the twenty-first century.

Getting Started

It is important to recognize the difference between marketing and advertising. When you are marketing, you use strategies to create interest in your museum. A good marketing plan can help position your museum in front of the competition. Focus on the big picture and your marketing efforts can persuade teachers to do business with your museum and convince them you offer the best value for the money they spend.

Most museums begin a marketing program for their education programs for three reasons: to insure adequate participation for programs, to communicate with teachers and schools what the programs are about, and to convince teachers and school administrators that the museum is worth a visit. To ensure participation, you must communicate the message that the program is useful and meaningful. Market the value and importance of the planned program, and what it can contribute to the lesson the teacher is teaching.

Four keys essential to a museum marketing program include:

1. **Develop and maintain credibility.** Develop a track record of well-run, high quality programs that build respect and trust with regular teachers and schools. Show them that you provide programs worth their time and money. Also, demonstrate that your programs meet their required goals and objectives.
2. **Build on successes.** Listen to the teachers, both in terms of suggestions on how to change current programs and practices and what future programs they would attend and why. Let them know their evaluation of the visit is taken seriously.
3. **Know the competition.** Learn about the competition's programs. What are they charging? Who are their participants? How do they attract these participants? How can they assist you in designing and marketing current and future programs? Don't limit your competition to just other museums. Pay attention to what movie theaters, local farms, and malls offer to schools.

4. Find a market niche. Find your museum's unique content area and design ways to offer programs around the topic that belongs only to your museum. Think about long term gains and track all topics requested by teachers, even when they are out of the usual scope of programs offered.

When the Doak House began planning for education programs, we had just opened and had no plan on how to tell its story of triumph, tragedies, hardship, and glory. We existed with no identity in the broader world, no budget, and certainly no track record on which to build. The four keys to marketing provided serious avenues to research in putting together a plan.

Think it Out

Before designing any marketing promotion the following questions need to be contemplated and well thought out. Do not be afraid to think outside the box.

- Who needs to be sold on the value and worth of the program? (Don't forget about school administrators and school board members.)
- What type of promotional material would most likely capture the attention of teachers in your target market?
- Would different copy or pictures make a difference in reaching a wider audience?
- What factors need to be highlighted to attract potential teachers to visit the museum?
- Are there wider factors related to the program content that might influence potential teachers to attend, such as testing? If so, how can attention be drawn to these in the promotional materials?
- Where learning transfer is important, how might interpreters get across the idea that a well-designed transfer plan is incorporated into the program?
- Does the transfer plan fit the context in which the students will apply their new knowledge and skills?
- Have a comprehensive and understandable description of the program(s). Do you have the right product to fit the needs of the audience that has been selected?
- Consider the cost to participate in the program and travel expenses. Do you have, or can you get subsidized funds for the program?
- Emphasize how the program relates to your museum's mission.
- What does the program offer in the way of helping the teacher, the school, the students? Create value.

Promote, Promote, Promote

Your answers to the questions above create a clear picture of the audience you want to reach. Within your museum's marketing budget, begin to prepare and plan for distribution of the promotional material.

Photos courtesy of Doak House Museum, Tusculum, TN

Teacher kits promoting the Museums of Tusculum College.

Popular promotional materials include brochures, online announcements and materials, and newsletters that often get lost on the desk or even discarded. Think outside the box and provide promotional pieces to teachers that can be used in the classroom year round and that are creative in scope and appearance. The piece should catch the reader's attention, create interest, engage the reader, and inspire action…like the teacher booking that reservation. Several pointers for preparing good promotional materials include:

- Keep in the forefront the audience's interests, experiences, backgrounds, and contexts in which they live and work.
- Keep it simple. Use short sentences, familiar words, and clear images.
- Say what you want to say and no more. Use as few words as possible.
- Images should match and illuminate the text.
- Use present tense, action words, and action images to give the message a sense of urgency.
- Do not overcrowd images…this disrupts the flow of the message.
- Emphasize benefits! Teachers and students should be able to see what they will learn and do. How does this program help the students and meet the needs of the teacher?
- Convey enthusiasm and let this convince the teacher and students to share your excitement.

Today's environment regarding museum visits centers cautiously around funding issues. These include museum admission, transportation, and low-income, disadvantaged populations who need the type of experiences a museum visit offers. A subsidized fund is a key word that teachers look for as they consider museum visits. Providing subsidized funds is an important aspect in marketing to teachers. Sources of funds for subsidies include: business organizations, philanthropic-minded individuals, sale of product or materials, foundations, special interest groups, federal, state, and local grant agencies, and endowments, fundraising events and in-kind contributions. In the financial planning for your institution, subsidized funds are well worth the time and effort it takes to put the program together. This can make you stand out above the competition in your area.

The beginning of each school year is a crucial time to market the value of your museum to teachers. As they plan for their curriculum, resources, and material requirements for the year, your museum needs to be very visible in the classroom. The old adage, "out of site out of mind," is very true. The Doak House used different mediums over the past several years in order to stay visible in the classroom. Marketing materials used included die cut bookmarks containing information on programs, classroom posters with a lot of color and action pictures terrific for decorating classrooms, and colorful boxes filled with goodies for the new school year and reusable as a container for pencils, crayons, rulers, and other accessories used by the teacher.

School group at Doak House Museum.

Getting the Educator's Attention

Marketing is more than sales. Marketing is an activity used to get a teacher's attention, to motivate the teacher to visit the museum, and get the teacher to actually visit, and last, but not least, get the teacher to visit again and again and again to build in retention from year to year.

Marketing to teachers means defining your product, positioning your museum program, promoting your product, distributing your product, and maintaining a positive relationship with your teacher and the students he or she brings. Keep in mind the **Five P's:** Product, Positioning, Place, Price, Promotion.

Product is what you have to offer to the teacher and the students. Be able to say in one clear sentence why your product is perfect for the teacher and students and what it does best. Be certain to know the features and benefits of your product and be able to have them flow freely off the end of the tongue. Practice over and over and remember what value this product provides.

Positioning is how the teachers define your institution in relation to your competitors. This is important because you are competing with all the other museums, attractions, and entertainment agencies in your target area. Be certain to know your competitive advantages. What do you have that gives you advantage over your competitors. Are you a small and flexible museum, do you offer high quality, low cost programs, are you offering unique benefits, or are you the first to offer this type of opportunity to the teachers and students?

Place is the method you use to make your product available to the teachers and students. Do your homework. Fit your offer of programs to the teachers' needs, be certain the prices you charge are competitive with others in your area, and communicate over and over with the teacher. You will reap the benefits.

Price is the amount of money charged for the service provided to the teacher and the students. Make sure the price is not too low, or the product will not be taken seriously. If it is too high, the potential teacher will not take the risk of asking parents to fund the visit. In many cases, low prices may help penetrate the market quickly and deeply to win a large market and help control the competition.

Promotion is the mix of advertising, personal sales, sales promotion, and public relations a museum uses to pursue its marketing and advertising objectives. The goal is to move the teacher from unawareness of the museum to awareness of the museum. Take teachers from basic knowledge of the museum, to a positive attitude that they intend to visit the museum, to the actual museum visit. Be sure you identify what you are offering the teacher and the student, and what do you want them to do. Be certain to promote the phone number teachers call to place a reservation.

The most traditional avenues of promotion include: brochures, flyers, email, form letters and memos, postcards, catalogues, personal contacts, exhibits, coupons, direct mail, posters, event listings, reviews, radio, word of mouth, press releases, and classified advertisements. Less traditional, but very much a way of the world today is Web marketing. Web sites are a great tool because they allow a museum to educate potential visitors about their product by reading about it on screen, seeing a video demonstration, or downloading a hard copy of a brochure or lesson plan. As teachers actively look for better ways to meet their needs, the Web is a natural place for them to search for a museum to visit. Remember, competition crowds the Web. Make sure that you use keywords in your site that will attract your target audience—teachers and students. Web sites now reach millions of people, but they speak to one person at a time. Use a more conversational tone and make a genuine personal connection with the teacher or student visiting the web site. Motivate teachers to take action and visit with you. Remember, you are talking with someone, not at them. Let the enthusiasm for your product shine and you will connect and get good results. Promote the value of your product with passion.

Press releases are a great way to announce your museum program to teachers. When sending a press release, you should prepare a press kit that includes a cover letter to the editor, the press release about the announcement, a sheet that features the product you are marketing, a background sheet about your museum, names of contacts regarding the press release, and a picture of your museum. Tying your press release into current events or human interest stories will give your press release a better chance of being published. Tailor the press release to each publication or type of publication you are mailing to. Your opening sentence should be clear and concise. Include in the release the museum's name, the price, a contact name, the address, phone number, fax numbers, and e-mail address of the museum. Be prepared to take questions and remember that enthusiasm makes all the difference.

The **Five P's** provide a clear picture of your target audience and how to them. Marketing to reach teachers is a sale, but it is more than that. Marketing to an educator means that how you are marketing and what you are marketing must meet the needs of the teacher and the students. Teachers are naturally excited to learn anything that helps them understand and fulfill their own needs as an educator. Create a sound relationship with the teachers who are in your target market, be respectful, have an open communication route, and be a sincere listener. Creating a healthy dialogue with teachers is critical.

Chart Success!

Use of the educational program marketing planning form can help in preparing a marketing plan. Choose a program for which you need a marketing plan and complete the chart on how you would go about preparing the plan.

Museums have long had the reputation of being a place where one doesn't touch and must whisper like being in a library. Do not let your marketing reflect a "Don't Touch" sign. Make your marketing so tantalizing that someone just *has* to visit. Be positive, be the museum that fulfills needs of teachers and students. Training our brains to take a positive approach in all marketing is not easy. We need to train our brains to watch trends, especially with our competition, notice which products are hot and which are not, recognize our resources and what makes us the best, and identify our competitive advantage. Be innovative, get teacher and student feedback, and be consistent in marketing materials.

Creativity

Being creative to find ideas that work for marketing on a low budget is possible. Be certain that everything you do communicates benefits and value and makes a strong call to action! Keep your customer relationships service oriented. Know and understand the teachers in your market and provide them with what they want. Aggressively look for new ways to persuade teachers to take a visit to your museum. Increase your museum's visibility by partnering with a community based group for a special event. Get out and get those networking activities going. Provide free samples of a program to teachers. It is cheaper than paying for printed word,

Educational Program Marketing Planning Form

Name of Program and Proposed Date: ______________________________

Target Audience: ______________________________

Types of Promotional Material to Use: ______________________________

Target Time for Distribution: ______________________________

Proposed Cost: ______________________________

How can you improve your marketing efforts? ______________________________

Ask at least two people who are either involved in the planning process with you or who are knowledgeable about your organization to review your plan.

Use the feedback to revise the marketing plan.

and if it costs you a lot, it is only because it worked well! Partnering with other museums or businesses to place marketing ads in magazines, brochures, or flyers will save you money and get you visible in places where you could not advertise alone. All these ideas are easily done with very little budget outlay. The best way to stay focused and be realistic in your marketing is to have a marketing plan for your museum visit.

Be certain the staff member marketing your site is visible in the community. Their visibility not only gets the name of the museum out, but it allows opportunities to market verbally at any given time. Just by having a staff member out in the community networking, the Doak House received free magazine ads, free flyers, and free brochures. Teacher contacts are good, but those tourism agencies, Convention and Visitor's Bureaus, and neighborhood papers are a plus. Use them!

Get Out the Pencil

To start, write a simple marketing plan. It is not as hard as it sounds. The content matters most, not the writing style of the plan. Adopt this plan as your programs evolve. It is a tool you should not be without. Remember, a plan on paper is only useful if it's put into action.

SIMPLE MARKETING PLAN

1. Analysis

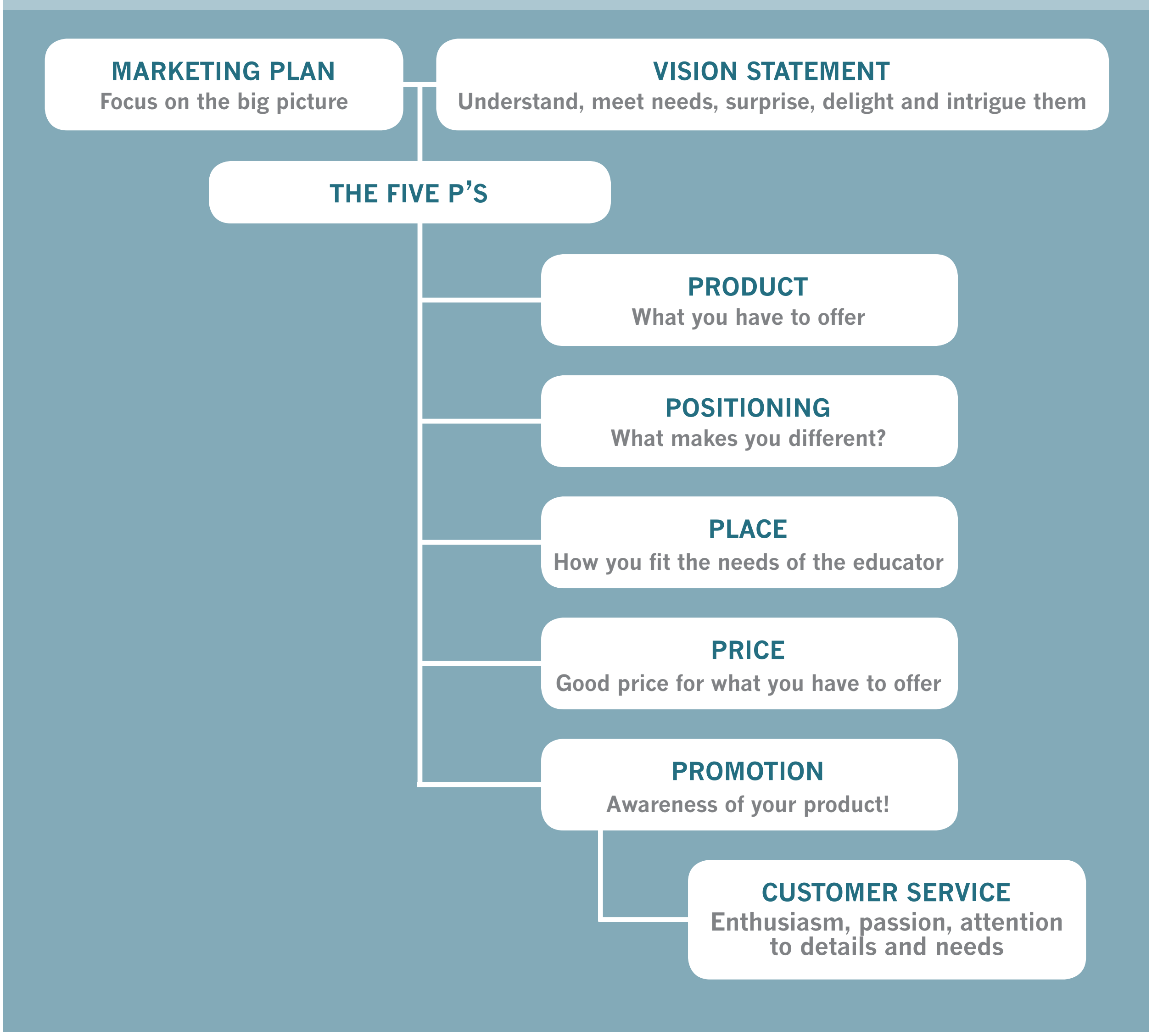
A. Short description of service/program.
B. Marketing advantages of service/program.
C. Marketing disadvantages of service/program.
D. Competition.

2. Audience

A. Target audiences (list each, with demographics—age, gender, and other characteristics)

3. Goals

Chart Your Way to Success



A. List marketing goals for the life of the service/program (6 months, 1 year). Make the goals realistic and measurable so that you can easily evaluate your performance.

4. Strategy

A. Overview of all marketing strategies with a list of how to execute them. Include all actionable steps to be taken. Write these steps on a calendar.

B. Budget—Breakdown the costs associated with each strategy. If a strategy is too costly, go back and make revisions.

Let's Talk About Customer Service

Good customer service is the lifeblood of any business. Good customer service brings customers back year after year.

Develop a vision statement regarding good customer service at your institution. The statement includes understanding your customer, how you can meet the needs of your customers, and how the museum experience will surprise, delight, and intrigue the customer.

The museum and the education staff needs a relationship with the educator, the customer for your education programs. A customer service experience begins with the first phone call to the museum. They want to talk to a live person, not a machine. Focus on the educator, their needs, and how you can satisfy those needs on the phone, in the classroom, before the trip, during the trip, and after the trip. Smile, have enthusiasm and passion prevalent—whether on the phone or eye to eye. Listen to the teacher and make the appropriate responses, even if just a suggesting on how to solve a problem for them. Cater to him or her with on-demand personalization of their visit.

With that first phone call, the relationship with the customer has begun. As you develop your relationship, do not make a promise you can't keep. Reliability is the key to any good relationship. Good customer service is no exception. The trip to the museum reflects on the museum and the personal relationship it enjoys with each class. Send them away happy to pass feedback about your museum along to others. Repeat customers keep a business going. Building customer loyalty is timeless. Remember, the emphasis on customer relationship has long term value! The whole experience and the whole package is important, let them know you want what they want.

Customer Service Tips

- Let the educator know what is in it for them.
- Put the teacher first.
- Price, quality, and on-time delivery are very important.
- Deal with complaints timely and in a professional manner.
- Be helpful.
- Be courteous and knowledgeable.
- Take an extra step and make an extra effort.
- Throw in something extra, like a coupon or a smile.
- Solicit and use testimonials from satisfied customers
- Stay proactive.
- Delight the educator.

Passion Sells

Shape your service around the educator's needs and desires. Determine what makes you different and sell it! Your passion about what you have and how it will benefit the educator is contagious. The educator needs to know that you know what they want and can deliver this service with a smile. Giving the whole package will bring your customer back again and again. The whole package starts with the promotional marketing piece. Once the phone call is made, it is up to you to sell the whole package at this point.

Bringing it all Together

Museum creativity in the twenty-first century in marketing and programming is a must. First and foremost is customer service, museums providing teachers and students with avenues to meet testing standards, mandates, goals, and objectives. Museums must provide customer service that will make it easier for the teachers to do his or her job and fulfill student learning needs. You must be enthusiastic about what you have to offer. Marketing can be done in many ways and on many levels, but enthusiasm is contagious. Spread it around, the museum will reap the benefits.

In 1998, the Doak House Museum opened its doors to the public with five key programs available for teachers and students. Attendance has steadily grown each year serving 50,000 students and teachers over the past nine years. The analyzing, planning, organizing, and promotion of our product and its value to our audience brought about an exchange that is mutually beneficial to the museum and the teachers and students served.

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AASLH Technical Leaflets:
TL#230 Designing a Summer Teacher Institute (2005)
TL#202 Developing Effective Educational Programs (1998)

technical leaflet

SAN MATEO COUNTY HISTORICAL ASSOCIATION & MUSEUM

PLANNING MUSEUM TOURS:

for school groups

By Richard Vanderway
Whatcom Museum of History and Art
Bellingham, Washington

Because education is a high priority in museums throughout the country, as well as a requirement for official museum accreditation, many small and intermediate-sized museums are seriously looking toward special education programs for school groups. Initial programs in most small museums take the form of once-a-year exhibit tours especially designed for school children at a particular grade level.

It is hoped that these notes will provide some basic insights for those planning the design of these tours. Since classroom tour programs will usually be developed around existing exhibits, the paper is written from this point of view. The same considerations hold if one is lucky enough to be developing a tour program for an exhibit yet to be designed. In this case, it is recommended that the exhibit tour be developed as fully as possible before the exhibit is physically set up. This will enable tour planners to more fully realize the program's needs and allow them to voice these needs to exhibit designers. A thorough awareness of each other's needs will allow tour planners and exhibit designers to work together cooperatively to develop an exhibit acceptable to both.

Developing Subject Matter

The obvious first step in developing a student tour is to decide upon subject matter. This may seem to be an easy task. After all, the subject must deal with the museum's whole exhibit area or some subset of it. It might seem logical to pick one of the museum's largest or finest collections. Perhaps the tour guide could talk on the area's most famous pioneer or develop the program around his own favorite subject. This would at least guarantee an enthusiastic presentation.

Many small museums have decided upon student tour topics in this way. In doing so, they are making their first and often fatal mistake. The problem is this: the museum must not look at the tour subject from its own point of view, but instead must see it from the point of view of those who will be their audience—in this case students and in particular the school administrators and teachers who will decide whether or not students will take part in a museum tour.

A successful tour program needs more than good tours; it needs tours that serve the needs of the audience. In the final analysis, the success of a tour depends upon the museum's ability to interest this audience, an audience that is attracted by the tour subject's interest at a given grade level and its relevance to a specific course of study. For example, an exceptionally well-planned unit on the winter flight pattern of the rare Spenzelly bird probably would not attract groups from a local elementary school. On the other hand, a tour stressing simple bird identification and habitats, and designed to complement the local school district's second grade unit on animal life, probably would.

The tour planner must know his audience. He will need the help of school district administrators to provide official sanction for his programs and to provide a wide base of teacher response. Avenues of cooperation must be explored to set up methods of reaching teachers and scheduling tours on an accepted district-wide basis. It is important that he ask school curriculum experts how he can be of help. He must become aware of curriculum programs at individual grade levels and determine how the museum's exhibits and objects can best be related to these programs. He must seek the help of teachers and find their wants and needs. He will discover that there are many areas in a grade-level curriculum that cannot be covered well in the classroom situation. School personnel are constantly looking for ways to complement and extend classroom learning. The museum, with its special resources, knowledgeable staff, and store of real objects to augment student learning and concept-building, can fill these gaps. If the student tour can fill acknowledged teacher needs, a quick and wholehearted acceptance from local schools can be expected. The museum's audience will be ready and waiting.* Programs will be especially successful if tour guides are familiar with the basic sequential development of a curriculum unit in the classroom. A knowledge of the facts and concepts that the students have been exposed to in class prior to the museum visit can provide a springboard to further learning in the museum, so that the tour can be a direct extension of classroom learning or a more efficient review or complement to classroom work.

Good tour subject matter will be a compromise between two essential ingredients. First, it must fill an acknowledged school/teacher need, and, second, it must be a subject that can be adequately discussed and visualized by the use of some parts of a museum's exhibits. Each ingredient is as important as the other, but neither can do without the other.

It is often wise to look at curricula at many grade levels in detail and to develop individual programs for a number of classes. Indian and early pioneers, for example, might be brought into a program for third graders studying early settlement, while an exhibit on 19th-century logging techniques is developed into a special program for sixth graders in a curriculum unit on conservation. Some museums could use the same exhibit at various levels with different emphases. A natural history museum might develop a simple identification unit for third graders based on an exhibit of mounted mammals. Seventh graders could use the same exhibit to study animal ecology.

Basic Research

Another major step in the development of student tours is research. Research is the foundation on which the tour will be built. Most of the information revealed in a tour situation will be based on facts and concepts to put these facts together. There is no better way of obtaining this factual information than to do some good thorough research on the tour subject.

The tour planner must ask himself how much he really knows about his subject. If he thinks he knows everything he needs to know, he should research anyway. He may not know as much as he thinks, or he may find that some of the things he thinks he knows are wrong. He has an obligation to see that tours contain only documented and accurate information. Research provides the facts that are the backbone for both historical accuracy and proper interpretation.

Important research takes place at the school district also. Good curriculum-related tours demand a thorough knowledge of the objectives and information taught at the individual grade level and the sequential development of those studies throughout the school year. Tour planners must initiate continuing conversations with school administrators. School personnel can provide information that will allow the tour planner to develop a truly curriculum-based ex-

*The museum may wish to develop a tour around a subject *outside* a given curriculum or acknowledged teacher need situation. Good communication with teachers and administrators is especially important here. The museum must convince the schools they need something they did not think they needed to assure itself of an audience.

perience at the proper time in the school year and will give the tour guide an ability to show objects and relate information relevant to specific units taught in the classroom. Thus, the tour can be a significant extension or positive review of classroom work.

Meetings with district specialists should include discussions of curriculum material at each grade level (relevant to museum exhibits) and how museum tours might complement these materials. Once tour planners and school personnel suggest an exhibit tour for a certain grade level, more in-depth research into how studies are presented in the classroom is required. Research with curriculum unit study guides, relevant student textbooks, special experiences provided to students, and even classroom visits might be possible. Planners may wish to be present for films, special pioneer days, or outside speakers who deal with subject matter of interest. The more the tour planner knows about his audience the better he will be able to react to that audience's needs. Research work at school districts may also lead to the development of communications with teacher groups. District personnel can often set up meetings or workshops at which the tour planner or promoter can receive teacher input and set clear expectations for tours. Dealing with teachers at a district-wide level may eliminate the need to contact each teacher individually.

When the subject has been thoroughly researched, the tour planner must analyze the material and information he has found. Why is the exhibit worth developing into a school tour? What new information or ideas does he expect the student to become aware of or understand at the end of the tour? Analysis of research should lead to the development of a set of tour goals or objectives. They should state what the exhibit tour is trying to accomplish.

Educational psychologists feel that objectives should be developed in behavioral terms. These objectives are based on "learning outcomes." The tour planner states his objectives directly in terms of what he wants the students to be able to do or state after they have participated in the tour. These objectives usually include three factors: 1) a description of what learners are supposed to do as a result of their exposure to the exhibit, 2) a method of testing to see that they can do what is expected of them, and 3) a statement of what will be accepted as minimum performance on this test. Museums do not generally have the opportunity to test students after an exhibit tour. Nevertheless, defining objectives in terms of observable outcomes can help to bring these objectives into clear focus. The tour planner wants to know exactly what he is trying to do. It is often best to leave vague statements such as "the student will comprehend" or "the student will understand" out of objectives and instead to include observable conditions such as "the student will be able to name, list, compare or adequately explain" about facts or concepts.

When objectives are clearly written and understood, a set of "points of emphasis" should be developed. These will cover the main points that must be discussed or viewed if the objectives are going to be carried through. The points of emphasis, based on particular objects, exhibits, facts, and concepts, will become the outline on which the final tour program will be built.

In research, it is often a good idea to jot down anecdotal information as well as factual information. Anecdotes and stories which complement or extend factual material often help to make concepts more clear and to make the past more real and believable. Anecdotes help children to see a past event from the point of view of real people who were really there at the time. Our forefathers often had to deal with many of the same needs and problems confronting us today. Anecdotes that reveal details of their times and how they reacted to universal needs and problems can help make past times relevant to today's student's own experiences and associations. This is particularly true if the anecdote expresses a point of view of a child near the age of the students in your tour group.

Amateur local histories are often a good source of anecdotal information. These stories, properly placed, can be interesting to adults and children alike. For example, a flail is a tool for threshing. Using it is hard work. These are statements of fact. These facts can come alive if the tour guide can relate a story from a local history about a ten-year-old boy who held his breath at planting time as he waited to hear if his father would plant oats. If oats were planted, he knew he would have a long hard flailing job come harvest. He hated oats because he hated flailing. Today's youth can easily relate to a boy's wish to get out of some hard work.

Tour Development

Learning, in the tour situation, takes place through the interpretation provided to the student by the tour guide. The tour guide interprets objects and exhibits in the museum.

What, in fact, is interpretation? It is a word that has been defined in many ways. The basic foundation for interpretation is generally facts, but most museum people feel interpretation is more than facts. Interpretation seems to be the method of bridging the gap between facts and the contexts of our own daily lives. Interpretation seems to be any method tour planners and tour guides can come up with to make the facts of the past understandable in terms of real people, real places, and real times. It is humanizing the past to make it real as the students know the present is real, so that they can identify with this past as their own. Interpretation must include the whats, but also the whys, the results of these whys, and how these results affected the times and peoples. How do these results affect students today? Interpretation may also include "How would I have felt?" or "How would I have acted?", projecting the student's thoughts and feelings into the past on a personal level.

Interpretation must bring the story to the individual student. This student perceives information and concepts through the veil of his or her own experiences and values, and good interpretation must start with the student's own experiences if it is going to lead him or her in new directions. The story should be a complete unit, with beginning, middle, and end. Good interpretation will be a whole idea, a unit which the student can grasp as a total picture.

Many feel interpretation in the museum is more a stimulation to learn than a full-fledged learning experience. This may be true for the casual museum visitor. The student in a classroom tour, on the other hand, has been brought to the museum for a definite purpose—a learning experience. Properly developed, the student tour will be one section of a broader educational picture in the school curriculum. It is hoped that the student tour, coupled with or extending previous classroom instruction and followed through in the classroom, can become a real learning experience.

How can tour planners fit these definitions of interpretation to their subject matter for a successful student tour in their own museums? First of all, they must remember the basic foundations of their program. One foundation is facts and concepts; the other is artifacts and exhibits in their own museum.

MOBILE MUSEUM

TABLE I
A Three-Level Category System for Tour Interpretation of Objects and Exhibits

LEVEL 1: The Object Itself. Much of what a museum guide talks about pertains to a single item in isolation from other items. What is the item? How does it work? What is it for? How was it made? Who made or used it? How old is it?

LEVEL 2: The Item in Its Context of Time and Place. The tour guide can talk about an item in the context in which it was used. It can be discussed as an example of a life style at a certain time or place, or be used to develop a relationship between life styles at given times and places. What did the object have to do with social milieu, with events of the times, with the way people thought and lived and acted? The item may be an example of the extensive use of wood at a given time and an example of the folk art of a given location. It might show a people preoccupied with religion or be an example of a tool to fill the need for a self-sufficient life on the prairie. It may help to define how a people made a living or how they were educated.

LEVEL 3: The Object Used to Compare Contexts of Time and Place. The object represented gives an idea of a given time and place. Using knowledge in the student's own experience of other times and places, especially the student's own present time and environment, a tour guide can make comparisons between these situations and those of the objects or scenes in the exhibit. On this level, the guide can talk about differences, changes, or similarities (remember, basic human needs change little over time). In what ways were the homes of the early settlers in the Northwest the same as our homes today? Do we live in self-sufficient family units? What would be one of your jobs in the 1880's that you would not have today?

What would some known present location have been like in the past? How would this differentiate your life style and theirs? How were these people similar to you? How were their times different? What would you have done under similar circumstances? What would happen today if you reacted the way they did then? How did thoughts and actions of people in the past influence the way we think and act today?

Statements from the three levels listed in TABLE I will be the heart of the tour interpretation. If a tour guide "interprets" on the first level only, he will not be using interpretation as defined in this paper. He will be talking about separate items outside of their environmental and historical contexts. The tour guide will be informing students about objects, not history. Historical insight into the lives and times of people and events are developed by discussing objects on the second and third levels.

The tour guide cannot, however, spend all his time at the upper levels. It must be remembered that a museum is teaching through objects. Slide presentations and lectures without objects can be accomplished outside the museum institution. LEVEL 1 interpretation is essential to the museum definition. For many children, seeing, touching, using, and hearing about real objects from the past will be the starting point for learning and a source of enthusiasm to stimulate this learning. Whatever the exhibit, a good program will include facts, information, and a story line that fits into all three categorical levels. There will be exceptions, but a three-level presentation on these lines will almost always lead to a real learning success.

Museums use objects and exhibits for educational purposes. The museum is the one institution that deals primarily with "object education." The tour program will be developed around some use of objects. Students will be seeing, and in some museums, touching, using, and/or hearing about objects in ways that will help them to leave the museum with more knowledge and information than they originally brought with them.

The total tour program will be a combination of facts and objects and the interpretation and concepts that bridge the gap between these facts and the minds of the students on the tour. A storyline will need to be developed that incorporates facts, concepts, objects, and interpretation in many different forms. TABLE I is a three-level category system for interpreting objects and exhibits. It does not represent the facts and concepts appropriate to a given subject matter. It does represent one system for developing the kinds of facts appropriate to historic interpretation. These are the *kinds* of things the tour guide should talk about and discuss in the exhibit tour.

TABLE II
Methods of Delivery
in Student Tour Programs

Tour Guide Activities:

Primarily Verbal:

1) stating facts & concepts
2) asking questions
3) answering questions
4) telling anecdotes & stories
5) telling jokes
6) making comparisons
7) asking for verbalization
8) listing names
9) stating records (biggest, smallest, oldest, etc.)
10) initiating guessing games

Primarily physical:

1) showing exhibits
2) showing objects, materials
3) role playing & play acting
4) demonstrating
5) showing slides, dioramas, scenes, paintings, photos
6) wearing costumes

Student Activities:

Primarily Verbal or Cognitive:

1) listening
2) seeing things that are shown
3) asking questions
4) answering questions
5) verbalization of ideas
6) making associations & comparisons
7) guessing games
8) role playing & play acting*

Primarily physical:

1) games
2) working artifacts*
3) using materials
4) making things*
5) physically examining objects,* touching
6) smelling, tasting
7) role playing & play acting*
8) wearing costumes*

*activities can involve one student or whole class

A glance at TABLE II clearly shows that there are many methods available to help get the interpretive message to student visitors. TABLE II lists methods in active use in many museum settings. Tour planners should think of one or two real children of the age in question as they develop their program, then use delivery methods they feel would be of interest to these real youngsters.

Earlier it was stated that students are at the museum for a purpose. They are there for an educational experience. This does not mean, however, that tour planners have an excuse to present students with a dry, overly academic statement. Although teachers are clear on the purpose of the museum visit, students themselves are not always so clear as to why they are present. It is also true that students "tune in" to the learning process from many different viewpoints and levels of interest. The tour guide must do his best to present materials in ways that will provide interest and stimulation to a maximum number of individuals. This will often include providing information that is entertaining as well as informative.

Although most of the students will be energetic and anxious to learn, their attention span can be quite short. They sometimes "turn off" presentations they cannot actively be a part of. It is often important to provide the students with an opportunity to feel they are actively involved in the tour and to develop a presentation with a number of methods of delivery. This provides a more varied and changing experience.

A word often heard in connection with children's tours is "participation." Children seem to react more positively to presentations if they can physically examine the objects on exhibit, put things together, or make them work. Most participation is seen as involving the students in some physical activity which allows them to be a part of a process or to use a number of senses to physically examine objects.

Participation seems to be a very successful tour delivery method, but it often involves special equipment or a special exhibit setup. These conditions are not always available in the small museum. Some attempts can be made to include a number of "touch" or "work" situa-

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tions, but other methods must be devised to keep students' interest and involvement at a high level. Do not feel that the participation tour is the only presentation that actively involves students. There are alternatives.

It may be worthwhile to look at an alternative to a participation/non-participation scale of museum experience. The tour planner might think in terms of an active/passive scale. Students need an active experience, but there are many active forms of tour delivery that do not fall into what would commonly be called participation. More important, there are many forms of active experience that do not need special equipment or special exhibit setups. They need only the exhibit, the tour guide, and an audience.

A simple and very effective active experience is tour guide/audience interaction. This can take many forms. Any time students are able to voice their opinions or initiate statements, they are actively involved with the tour process. This might, in fact, be called "vocal participation." This ability to respond vocally is a rewarding experience to most students. Student interaction with the tour, providing a personal contribution to the discussion, adds greatly to the classroom interest level. Children, particularly those up to the seventh or eighth grades, simply love to talk. They like to be the center of attention and to know other people are listening to them. They like immediate responses to their questions. Asking questions and answering student questions, playing guessing games, initiating verbalization by students on relevant subjects—all will add enthusiasm and lengthen total student attention span. Initiating questions from students and giving serious answers to students' questions are also important in developing an active give and take interplay.

There are many places in the tour where questions rather than simple statements can be employed. Questions such as "What is it?" and "How does it work?" at TABLE I's first level work well, as do the examples of second- and third-level questions. Questioning allows students to be actively involved in the tour and also to be more personally involved in the story line of the tour. Properly directed questions help them to place the story into their own experiences and associations and to use their own personal knowledge to develop concepts and gain understanding.

Another interesting "vocal participation" method is what is often called inductive questioning. Induction is the process of arriving at general conclusions by observing the particulars. The student observes a particular fact or object situation, or has it pointed out to him, and then is asked to try to discover some broader general truth or concept. For example, the tour guide could ask the question "What was the major transportation route in the North-County area?" It is possible a student may know the answer. On the other hand, the guide might point out the fact that all the cities in the North-County area are situated on the river. He could then ask what this might show about early North-County transportation routes. In a series of directed questions and tour guide statements, students should be able to "discover" that the river was the major transportation route. They are clever enough to "reason out" the answer, even if none knew it in the beginning.

The important thing here is that the tour guide is looking for more than a factual answer, he is looking for a "discovery." The student does more than guess or state a known fact; he or she is putting two and two together to reason out some conclusion that may not originally have been obvious to them. Developing concepts through inductive questioning can become a fascinating game for the whole class—and the tour guide as well.

Space Considerations

The tour planner must consider how much space will be needed to provide comfortable viewing conditions. The amount of space needed for class movement and viewing is generally a factor of tour group size and tour delivery methods. Exhibit areas and hallways must be large enough to easily hold the whole tour and to provide smooth and fast movement from place to place. Open areas facing exhibits must be large enough to stand or seat the total group, and objects must be big enough to be seen at realistic distances. Objects should not be exhibited high above eye-level of individuals seated on the floor, and cases must be positioned to be visible to all tour participants. Demonstrations can be a particular space problem and often will demand room for close-up viewing from nearly a full 360 degree area to accommodate the total group.

Large numbers of walk-in visitors can add congestion to needed tour space. This congestion can be distracting to both students on tour and the museum's other visitors. A number of methods have been devised to deal with this problem. Some museums schedule student tours only during traditional slack hours and days. Others schedule tours for morning hours when the museum is not open to the public. These museums open in the afternoon for the casual visitor. A few large museums have de-

PENNSYLVANIA HISTORICAL & MUSEUM COMMISSION veloped exhibits that can route the walk-in visitor around spaces needed for the tour group.

Generally the total number of students brought to the museum at one time will be some multiple of a classroom unit size. The average size classroom unit is about 25 or 30 students. This means the museum must accommodate 30, 60, or even 90 students at a given time. One may limit participation to a single class at a time, a group of 30, but limitations to smaller numbers will drastically reduce attendance. Most schools will not bother with programs that will not take a whole class. Try to provide space for all 30 students in a single tour if at all possible. If the museum accommodates a full class at a given time, but limits the maximum number in a single tour to anything less than 30, then two or more tours per class will be needed. Concurrent tours mean double the staff needs and in a small museum area add unnecessary noise and distractions that will hinder concentration and tour success.

Time Considerations

The time length for tours should be a matter of a consistent policy and be negotiated with teachers prior to the museum visit. Teachers will need a clear understanding of the visit length to allow them to schedule bus or car transportation.

Thirty to 45 minutes may be an appropriate tour length for pre-school and kindergarten children. Their attention span is short but can be extended by variety in exhibits, activity in delivery methods, and physical movement through the exhibit area. Classes of very young children will often have a "breaking point." They will be enthusiastic and attentive until some seemingly arbitrary point in time is reached and then lose interest almost en masse. Tour guides can learn to watch for these breaking points and begin to "wind down" the tour at these times.

Groups from first grade up can easily accommodate themselves to an hour-long format. An hour presentation seems to be a common time span in many museums, long enough to be worth the trip outside the classroom and short enough to retain a high interest level. Sometimes a variable time span may be chosen if acceptable to teachers. A teacher can be told that tours usually last an hour, but that a planned extra 15 minutes will add leeway to the tour. If students show a special interest in a particular subject area this extra time can be used.

Discipline

Student discipline problems are a major fear to the beginning tour guide. Most of these fears are unfounded. The student on tour of the museum is in a new and generally unknown environment. He or she is not familiar with the surroundings and is unsure of how the guide might react to student behavior. In this situation, the student is apt to act much more conservatively than in the classroom. Major discipline problems are rare.

Museum guides have differing views as to the teacher's place on a tour. Some museums make it plain in museum hand-out sheets that the teacher is solely responsible for the discipline of the class at all times. Some demand an adult for every 10 or 15 youngsters. On the other hand, there are examples of museums that ask that no teacher accompany the tour group.

Most small or intermediate-size museums do not generally have the opportunity to exclude teachers from the tour. Many would not want to. The teacher's knowledge of the tour experience is essential to a follow-up in the classroom. The other extreme may cause problems too. The teacher who has been lectured on her total responsibility for discipline often goes too far. Teachers are particularly sensitive about classroom behavior in public as it is. Stressing the teacher's disciplinary role is often seen as an invitation to interfere with the tour process at any moment to strictly enforce discipline rules. Teachers who constantly interrupt the tour guide to threaten or scold students for minor infringements are generally more distracting to tour guide and students than the original student disruption. Teachers who yell at students to "sit up straight" or "hold your questions to the end" may, at least, be breaking up a train of thought, or, at worst, be completely disrupting the guide's delivery method if he is trying to develop a "give-and-take" discussion.

Even though teachers will be present, the tour guide should make it clear that he is to be in total charge of the tour from beginning to end. The tour guide must be the commander, even when it involves reminding children to raise hands, sit still, or listen quietly. The tour guide is in the best position to do this unobtrusively.

In rare cases, an individual child's behavior will be more than the tour guide can handle. In this situation, he should hand the child over to the teacher and have the teacher remove him from the group. The tour can go on without the teacher but not without the tour guide.

Safety of exhibits and students usually means that a group must stay together. This can easily be accomplished by having students sit on the floor while discussion at a given area is in progress (it cuts down on excess movement very well) or by politely reminding straying students to remain with the group. If that one-in-a-million tour arrives that simply cannot be controlled, the guide can always use the option of terminating the tour. He will probably never have to use it, but it is good to know he can.

Age Variations in Student Reactions

Students in different age ranges can be counted on to exhibit a number of special reactions to tour situations.

Pre-school through first grade children often lack the basic knowledge and personal experience that would enable them to view museum exhibits as relevant to their prior learning. For these groups, the museum tour is generally seen as a total experience in itself. Teachers and supervisors want their students to learn the existence of museums and gain some understanding of them. Tours, therefore, will be general in nature and varied in subjects and exhibits. The idea is for the students to see the many components that can make up a museum institution.

Very young students will be excited and enthusiastic. They will ask many questions and look for opportunities to verbalize on many subjects. Often their answers and statements will be irrelevant to the questions or objects being discussed. Spontaneous statements at this level are not necessarily bad. Verbalization in a new situation is in itself a learning experience for the very young.

Some methods of delivery seem to work especially well. Young students are particularly interested in naming objects, animals, colors, shapes, etc. Questions and guessing games aimed at the students' own experiences and stories that relate the past to the students' daily lives are enthusiastically accepted. Specific pieces of information often become secondary to the simple experience of seeing, touching, listening, and verbalizing in the all new museum environment.

Second through seventh or eighth graders bring a different student to the museum. These students possess a basic store of experience and learning on which the museum visit can build. Although some teachers may still be interested in basic experiential tours, most will be looking for more specialized learning experiences to fit academic needs. Students, too, are looking for greater challenges and will soak up new facts and concepts with great enthusiasm.

Students at this level are interested in verbalizing their personal knowledge and are excited about extending this basic knowledge core. They will ask many and relevant questions and show little inhibition. They will readily compete with each other to answer questions and feel greatly rewarded when able to answer correctly, yet they will not be afraid to hazard educated guesses. The tour guide must have a clear knowledge of his subject and be ready for anything.

Any delivery method that allows students to ask and answer questions or to verbalize their ideas will work well here. A give-and-take dialogue, something the students see as a rather mature type of group interaction, will be especially pleasing. Students in this age group will also find inductive questioning intriguing and will enjoy the feeling of discovering ideas and concepts on their own or as part of the group. Their natural openness makes them particularly susceptible to these methods. It may be necessary to make sure the students accept a rule for raising hands and being recognized by the tour guide before speaking so that their exuberance does not lead to everyone talking at once.

Students from eighth to twelfth grades react in sharp contrast to their younger peers; where the second to seventh grade group is open, enthusiastic, and talkative, the older group often seems disinterested and non-responsive. This seems to be a typical reaction to the onset of adolescence. On entering adolescence, children become acutely aware of themselves and the ways others see them. They react to this new awareness by turning off many of their previously observable behaviors. The students fear being singled out from the group in public situations and tend not to respond individually or openly. The obvious outcome of this behavior is that the tour guide sometimes begins to feel that he is talking to a group of department store manikins. The guide must remember that in most cases these students are listening and will probably comprehend more than any other group. Students will appreciate the guide who presents a good tour even in the face of their seeming blankness.

The tour guide must be prepared to use more of a lecture-tour approach with adolescents, particularly at the beginning of the tour. These older students may be turned off by a guide's insistence that they "play the game" of answering his questions or following his inductive reasoning. They will generally not take the

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The tour guide may need to use a lecture-tour approach with older students, who are not very responsive.

chance of "hazarding a guess." An individual student will often not answer unless he is sure he is right, and he may not even answer then. If the tour progresses in what the students see as a mature-adult manner, they may become more secure with the situation to the point of actively responding, but almost never at the level reached by the younger groups. Special groups can be exceptions, of course.

Since less time is involved in interaction with this group, much more information can be imparted in a given time period. It is good for the tour guide to have a thorough knowledge of his subject and appropriate anecdotes to add interest to a less active presentation.

Pulling It All Together

Look at what has been done and see if it can be pulled all together. First the tour planners must choose subject matter that is appropriate to a school group's classroom curriculum so that they can feel sure the finished program will have an audience. The subject will be a compromise between teacher/student needs and available exhibit material at the museum. School district cooperation will be essential in arranging and scheduling tours from throughout the district. The next step is basic research. Research will produce the fundamental facts and concepts that the tour will deal with and will lead to a clear set of objectives. Written objectives tell basically what should be covered in the tour and what students are expected to gain from it. The objectives are then developed into points of emphasis—the outline on which the program is formed.

Next planners must take a detailed look at the objects and exhibits appropriate to the subject. If they are working with existing exhibits, objects may come before research. If the exhibit is to be new, the research will have defined the objects needed. The museum will use these objects as a major part of the educational experience. The three levels of interpretive information (TABLE I) are designed around these objects and exhibits. Based on the objects *and* the points of emphasis, the three levels of interpretive information will be the detailed facts and concepts to impart to the students.

Now tour planners have to decide how they can get this information across. There are many methods of delivery (TABLE II), and it is good to use a number of active methods. The objects and exhibits themselves will have a lot to do with the method used. Three similar objects in proximity to each other may invite comparisons. A period room may suggest questions about its furnishings. One may wish to name objects in a diorama and explain or demonstrate tools in a harness shop. A properly mounted saddle may invite participation. A student can sit upon it as the tour guide shows its parts. At the same time, a directed set of questions and statements can lead the students to discover inductively that many jobs (such as that of the harness maker) are tied to their times and technologies (such as horse transportation) and that there might be a good reason why we see few harness makers today. The age of student visitors must be kept in mind when deciding upon delivery method. Some methods work better with one group than with another.

A good presentation should be straight forward, no longer than necessary to cover the material, and should provide a whole idea—a story with a beginning, middle, and end. The exhibits should be viewed in some logical sequence. Some change in story line might be a proper compromise to logical order if an existing exhibit simply cannot be bent to fit the planned story sequence. Comfortable viewing and movement space is another consideration when working with the existing exhibits or designing new ones. Last but not least, it must be remembered that the enthusiasm of the tour guide will set the initial pace of the tour and provide an environment for a positive experience.

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TECHNICAL LEAFLET 93

Technical Leaflets are published by the American Association for State and Local History for the purpose of bringing useful information to persons working in the state and local history movement. The series does not follow the same categories month after month, since the selection of subject matter is based upon varied inquiries received by the Association's home office. The leaflets, which are detachable from the magazine, are copyrighted © and should be catalogued as part of HISTORY NEWS.

American Association for State and Local History Technical Leaflet 93, HISTORY NEWS, Vol. 32, No. 3, March, 1977. *Planning Museum Tours: for school groups.*

Reprints are available for $.50 each. For information on bulk rates, write to the Association at 1400 Eighth Avenue, South, Nashville, Tennessee 37203.

technical leaflet

HISTORIC HOUSES AS LEARNING LABORATORIES:

seven teaching strategies

By Thomas J. Schlereth
University of Notre Dame

> *"What people are within, the buildings express without; and inversely what the buildings are objectively is a sure index to what the people are subjectively."*
>
> —*Louis Sullivan*

The proliferation of historical societies and historic preservation commissions and organizations in the past two decades has produced a national trend of historic house museums across the United States. A movement that began with New York state's preservation of the Hasbrouck House (Washington's Revolutionary war headquarters in Newburgh) in 1850, now boasts over 500 structures. American historic house museums range from tiny seventeenth-century New England farmhouses to elaborate Georgian plantation sites; from trim Gothic revival cottages to ornate Victorian urban townhouses; from log cabins to apartment houses.

The historic house museum, although often memoralizing an elite society and thus interpreting primarily its historical associations or architectural novelty, is, nonetheless, a tremendous educational resource for a community's schools and colleges. In fact, the historic house can be used as a cross-disciplinary learning laboratory wherein at least seven approaches to the American past can be explored.

What follows here are suggestions for how local teachers can employ the house museum as this kind of learning laboratory for the study of American history, if museum staffs are also willing to embark on exploratory ventures. The seven learning strategies can be used by teachers and curators in piecemeal fashion or in any appropriate combination that seems relevant to the educational program of a specific historic house. While the following essay focuses on techniques and readings for students in senior high school, junior college, or the university, curators can easily adapt its ideas for a continuing education study group, a senior citizens club, or a seminar of interested adults from a local historical society. The recommendations can also be used as a basis for an orientation program for a house museum's new volunteer guides, as a curricular agenda for a regional workshop/seminar of historic house personnel, or simply as a primer for any museum professional who wishes to expand his or her knowledge of the enormous interpretive potential of American historic structures. Finally, curators can extract from the essay ideas for temporary exhibitions and new ways of involving the average visitor in thinking about a historic house from a multi-faceted perspective.

As will be evident, each of the seven approaches proposed here is particularly indebted to a specific disciplinary field of study. In order of discussion, they are: 1) cultural anthropology and folklife; 2) environmental and social psychology; 3) decorative arts and social history; 4) cultural and historical geography; 5) American studies and literary history; 6) architectural history; and 7) museum studies. In order to be of maximum use to the teacher or curator, each approach is presented in three components: *Inquiry Focus* (i.e., a capsule description of the purpose, scope, and ramifications of the approach and the questions it seeks to raise about a historic house); *Student Projects* (i.e., a summary of suggested class exercises, research ideas, curriculum materials, and field-work techniques that might be explored with students using the approach); and *Bibliographical Resources* (i.e., a brief survey of appropriate literature in each discipline that is readily available and easily adaptable for use by curators and teachers). Although this multi-disciplinary perspective is presented with a single historic house museum in mind, it can be used comparatively in conjunction with other historic house museums, local residences, and the homes of the participating students.

1. *HOUSE FORMS AND TYPES*

Inquiry Focus

Historic house curators understandably think of their residences as unique. Cultural anthropologists and material culture folklorists, however, tend to see all human shelter in regional patterns, house forms, or common types. While many American historic house museums were built in a "high" or "academic" architectural style (e.g., a specialized building often designed and constructed by a builder following a pattern book or an architect working within a recognizable style), such structures are often better understood if first compared as to house forms with the extensive vernacular buildings that surround them. House museums were frequently influenced by traditional building forms and, in many cases, have themselves influenced nearby local vernacular house types.

A knowledge of eastern Pennsylvania house types, for instance, will enable a student of that region to realize how the interior floor plans of certain Delaware Valley colonial houses remain distinctly German, although their exterior facades self-consciously ape English vernacular housing characteristics. An understanding of traditional building practices (and prejudices) helps explain what happened to the eastern urban row houses of Baltimore or Philadelphia when they moved out into the countryside. Row houses, by definition, have no windows in their side walls, but when they appear in the eighteenth-century American hinterland they often continue to be built without side windows. Or, if windows are added, they are of erratic size and spacing. A novice observer might explain the windowless gables on environmental grounds—"to keep the wind out." A student of house types would know the lack of windows is a matter of tradition (not a response to the climate) and a structural fossil that testifies to the house's original urban ancestry.

Students can learn a great deal about historic houses if they know the origins, modifications, and migrations of house forms such as the Georgian I-house, the hall-and-parlor, the dog-trot, the upright-and-wing, the four-over-four, the shot-gun house, or the H, L, or T-house types. Moreover, having students read in the anthropological and folklife literature of traditional, pre-industrial, vernacular shelter types prompts them to grasp the multiple determinants in house form. Such determinants are cogently summarized by Amos Rapport (*House Form and Culture*, 1969) as physical factors (e.g., climate, character of materials used in the building, and kinds of construction techniques employed in working the materials) and social/cultural factors (e.g., defense, territoriality, economic status, kinship patterns, sex roles, child-raising). Rapport's final chapter, "A Look At the Present," is especially provocative in contrasting American attitudes toward private ownership, single-family dwellings, and room specialization to the domestic residences of other cultures. Whether a simple brush-and-bough affair built by the nomadic Siriono Indians of Bolivia for a single night's use, or an elegant mansion on the beach at Newport, Rhode Island, the cultural anthropology of housing demonstrates to students how the form of a structure can be a strong reflection of the needs and minds of those who built it and, in addition, how it shapes and directs behavior.

In fact, as Peirce Lewis has argued, several major cultural changes are faithfully mirrored in the changing geography and history of American folk housing. In post-Revolutionary American history, he sees at least four major tendencies that every student of American housing should test with extensive field work: "(1) Increased regional diversity in house-types (and culture) between the Revolution and the Civil War; (2) Reversal of this divisive trend after the Civil War, and the rapid spread of national, as opposed to regional, house-types; (3) the prolonged isolation of the South as a distinctive architectural region, long after other regions had joined the national stream; (4) an increased tempo of architectural innovation [in the nineteenth century], paradoxically combined with an increased tendency to look backward for architectural reassurance."

Student Projects

Studying historic house museums in terms of house forms and types necessitates that students learn to observe carefully, measure accurately, draw precisely, and to study a building in exacting detail. Even if a structure has already been recorded by HABS or a local survey, it is important for the students themselves to go over the entire building, calculating and appraising its exterior and interior dimensions. Technical information on how-to-do this is cited below, and it is a necessary skill for any student of material culture to acquire.

The exercise is also valuable because it forces students to examine, describe, and translate three-dimensional artifacts into two-dimensional ones (elevations, isometric perspectives, general-, cross-, and longitudinal-sections, decorative and structural views, and floor plans). Finally, it compels them to see the structure as its builder(s) may have perceived its form, materials, and spaces. As Henry Glassie points out (*Pattern In The Material Folk Culture In The Eastern U.S.*, 1968), empathy with the mind-set of the builder is a crucial focus of the folklorist approach to housing types; actually it is an extremely valuable perspective for evaluating any residence. For example, following the lead of the folklorist or the cultural anthropologist, floor plans of the house museum can be plotted, converted to transparencies or slides, and then compared and analyzed with other floor plans of houses in the local area or region, with illustrations and drawings of other house forms found in published scholarship (particularly by folklorists and cultural geographers) on the topic, and with the floor plans of students' own homes. A model to follow in this type of class exercise is H.G. West's "A Change In Plans: Is The Modern House A Victorian Invention?" (*Landscape*, Winter: 1952).

Bibliographical Resources

Four sample regional studies of American house forms, how they vary geographically, and what these variations mean historically, include: Fred Kniffen, "Louisiana House Types," *Annals, Association of American Geographers* (1936); Peirce F. Lewis, "The Geography of Old Houses, *Earth and Mineral Sciences* (1970); Henry Glassie, *Folk Housing in Middle Virginia* (1975); and John E. Rickert, "House Facades of the Northeastern United States; A Tool of Geographic Analysis," *Annals, Association of American Geographers* (1967). Here one should also consult Bernard Rudofsky, *Architecture Without Architects* (1965).

Several general surveys of the development of housing as a response to cultural forces are: Ettore Camesasca, ed., *The History of the House* (1971); Stephen Gardiner, *The Evolution of the House* (1974); Paul Maguire, *From Tree Dwelling to New Town* (1962); and Christian Nordberg-Schultz, *Existence, Space, and Architecture* (1971) and *Intention In Architecture* (1965).

Since most current research in American house forms is being done by geographers, with strong interests in cultural anthropology, and by folklorists, journals such as the American Geographical Association's *Annals* and the American Folklore Society's *Journal*, as well as a relatively new, interdisciplinary publication, *Pioneer America*, should be consulted for the latest and most innovative fieldwork and interpretations. Several works outlining recording procedures include: Hartley J. McKee, *Recording Historic Buildings: The American Buildings Survey* (1970); Charles E. Peterson, "The Technology of Early American Building," *Newsletter of the Association of Preservation Technology* (1969); Thomas B. Renk, "A Guide To Recording Structural Details of Historic Buildings," *Historical Archaeology* (1969); and Warren E. Roberts, "Fieldwork: Recording Material Culture," in Richard M. Dorson, ed., *Folklore and Folklife: An Introduction* (1972).

2. INTERIOR SPACE CONCEPTS

Inquiry Focus

Environmental and social psychologists, as well as historians interested in demography and psychohistory, bring another perspective to the house museum. Their insights can be used to examine the historic home as a container of space, a place wherein real people once ate, slept, argued, recreated, procreated, attended to their sanitary needs and the like. For instance, two chapters, "The Anthropology of Space" and "Distances in Man," from Edward T. Hall's *The Hidden Dimension* (1969), can stimulate an initial inquiry as to how the original inhabitants (and subsequent generations) most probably experienced and interacted within the structure. One can try to calculate what would be, in Hall's terms, the average intimate distance, personal distance, social distance, and public distance available in and around the home. By having students posit the proxemic patterns of the historic house, particularly in comparison with others of its own period and of other historical eras, it is possible to raise and test some hypotheses about the residents' perceptual world. Hypotheses, for instance, about the pace, intensity, and civility of domestic life can be considered; so too can the issues of inter-personal relations, sibling rivalry, and the socialization of children.

Many questions are raised by this approach: How do homes reflect changing attitudes toward family, religion, community, and work? To what extent are family roles expressed within a house (men versus women versus children)? What are the expected behaviors of individuals within the various home spaces (the taboos, rituals, social conventions)? Which living spaces are most flexible? Most specialized? How is the house divided into public and private, ceremonial and utilitarian spaces? What role do real, symbolic, or psychological barriers—doors, lower ceilings, front and back hallways, side doors, or changes in wall or floor materials and finishes—tell us about the social history (and stratification) of the residents?

Robert Sommer (*Personal Space: The Behavioral Basis of Design*, 1969) provides an excellent introduction to the techniques of deciphering previous attitudes toward social and economic status, territoriality, conflict resolution, and privacy requirements from residential environments. Erving Goffman (*The Presentation of Self in Everyday Life*, 1959), likewise, offers provocative questions about how people express ideals of self within the house, particularly focusing on what Americans have done in the "front" and "back" zones of their living arrangements. In an essay, "Home as an Environmental and Psychological Concept" (*Landscape*, October: 1975), D. Geoffrey Hayward provides a five-step method of analyzing the American home as: a) territory; b) physical structure; c) locus-in-space; d) context-for-self-identity; and e) social and cultural unit.

Student Projects

The various historical "live-in" approaches employed by venturesome historic museum villages are one technique that might be experimented with more extensively in house museums in order to provide students with an extended spatial, social, and personal experience of the house. Such visits could occur at times when the historic house is closed to the public, particularly in the evening and during winter months when students would encounter its physical environment quite differently than the typical sunny afternoon visits of most brief field trips.

In preparation students should read any surviving descriptions of the house by former occupants (journals, diaries, correspondence, scrapbooks, etc.) or demographic data (genealogies, mortality rates, census data, etc.) and house records (inventories, wills, deeds, account books, etc.), that would expand their insight into the social and psychological import of the environment. They should be encouraged to indulge in the type of social psychology that John Demos (*A Little Commonwealth*, 1970) has done in his experiential and documentary reconstruction of family life as lived in seventeenth-century Plymouth Colony houses. In this context, students might also read J. B. Jackson's suggestive essay, "The Westward-Moving House: Three American Houses and the People Who Lived in Them" (*Landscape*, 1953). Jackson's playful comparison of a seventeenth-century Massachusetts homestead with one in early nineteenth-century Illinois and then one in early twentieth-century Texas gives students a splendid model for attempting imaginative reconstruction of family life in the past.

Photographs, useful in several of the approaches outlined here, provide superb curriculum materials for analyzing previous residential interiors. Using a sufficient sample collection of photos from the historic house and other residences, students can make various inferences as to how previous occupants of the historic house organized and used space. Did the arrangement of rooms, furniture, and objects influence relationships among family members? Are there common or unique elements in how particular socio-economic classes in American society chose to organize their homes? If people are included in the photograph, in what rooms are they shown most often, and in what relationship to the objects around them?

Bibliographical Resources

A survey of the basic research in the psychology of the built environment can be found in the Council of Planning Librarians Exchange Bibliography #301, *People and Buildings: A Brief Overview of Research* (1972). Historic house museum curators and teachers will also profit from reading in David Cantor, *Psychology and the Built Environment* (1974); J. H. Sims and D. D. Bauman, *Human Behavior and the Environment* (1974); and Kevin Lynch, *What Time Is This Place?* (1972). The provocative work of Herbert J. Gans—*The Urban Villagers* (1962) and *The Levittowners* (1967)—is likewise worth consulting.

Curators with colonial New England or nineteenth-century Victorian houses have particularly rich resources. In the former case, besides the work of Demos, one might use David Flaherty's *Privacy in Colonial New England* (1967) and the pertinent sections on family life and residential history in the demographic community studies of Sumner Powell, Philip Greven, Kenneth Lockridge, and Michael Zuckerman. The psychohistory of nineteenth-century domesticity has been charted by Clifford E. Clark, "Domestic Architecture as an Index to Social History: The Romantic Revival and the Cult of Domesticity in America, 1840-1970," *Journal of Interdisciplinary History* (Summer: 1976); Kirk Jeffery, "The Family As Utopian Retreat from the City: The Nineteenth-Century Contribution," in Sallie Teselle, ed., *The Family, Communes and Utopian Societies* (1972); and Robert C. Twombley, "Saving the Family: Middle Class Attraction to Wright's Prairie House, 1901-1909," *American Quarterly* (1975).

Two periodicals, the *Journal of Architectural Education* and *Design and Environment*, often feature articles on residential environments as well as analyses of privacy, personal space needs, and domestic territoriality. Also useful are two surveys of American interiors for comparative study and as a source of slides and transparencies: Meyrie R. Rodgers, *American Interior Design: The Trends and Development of Domestic Design From Colonial Times to the Present* (1947); and Harold L. Peterson, *Americans At Home, From the Colonists to the Late Victorians* (1971).

Perhaps the most comprehensive published collection of interior photography to surface recently is William Seale's *The Tasteful Interlude: American Interiors Through the Camera's Eye, 1850-1917* (1975). One should also look at George Talbot, *At Home: Domestic Life in the Post-Centennial Era, 1876-1920* (1976); the Benjamin Blom 1971 reprint of the four volumes of *Artistic Houses: Interior Views of a Number of the Most Beautiful and Celebrated Homes in the United States* (1883); Jeffrey Simpson, *The American Family: A History In Photographs* (1976); and, for a counter-culture contrast, Paul Kagan, *New World Utopias: A Photographic History of the Search for Community* (1975). Bernard Mergen and Marsha Peters, "Doing the Rest: The Uses of Photographs in American Studies," *American Quarterly* (Fall: 1977) is a bibliographical review essay filled with innovative teaching and research techniques. Curators should know the AASLH's *Collections, Use, and Care of Historical Photographs* (1977) by Robert Weinstein and Larry Both, and also keep current with the "Historical Photographs" column in *History News*.

3. *FURNISHINGS AND HOUSEHOLD ARTIFACTS*

Inquiry Focus

For many visitors to a historic house museum, the "things" it exhibits—its furniture, ceramics, silver, glass, wall and floor coverings, and the like—are often only perceived as *objects d'art*, quaint oddities, or as icons to which filial-pietistic homage is due by virtue of their association with a famous owner or user. However, a new breed of historians in the American decorative arts and in cultural history have become increasingly interested in a whole range of common household items (e.g., kitchen appliances, hallway stands, mourning pictures, eating utensils, cleaning devices) that are seen to mirror a society's values as accurately as its elite artifacts. This "everyday" material culture, what James Deetz quoting an anonymous seventeenth-century appraiser calls "small things forgotten," deserves equal attention in a house museum, along with its Chippendale chairs or its Tiffany lamps.

Student researchers should investigate and attempt to assess the cultural significance of residential spaces such as kitchens, bathrooms (or external equivalents thereof), bedrooms, stair and hall passages, ingle-nooks, pantries, nurseries, and the artifacts they contain. Research also needs to be done on servants' quarters, attics, closet spaces, basements, wash-houses and what material culture would be found in each of these areas. Such an approach shows students that in order to understand the past and the present it is necessary to study the ordinary and the typical, not just the unique and the luxurious.

To explore the history of the American bathroom, for example, students can work through Siegfried Giedeon's fascinating essay, "The Mechanization of the Bath" in a monumental book (*Mechanization Takes Command: A Contribution to Anonymous History*, 1948, reprinted 1969) that should be required reading for any course using a house museum as a historical laboratory. The material culture of nineteenth-century hallways (hat and clothing stands, mirrors, hall chairs, and card receivers) and dining rooms (table settings and eating utensils) has been imaginatively analyzed by Kenneth Ames in two studies that can serve as models for further research: "Meaning in Artifacts: Hall Furnishings in Victorian America" (*Journal of Interdisciplinary History*, 1978); and "Murderous Propensities: Notes on Dining Iconograhy of the Mid-Nineteenth Century" in K. L. Ames, ed., *Three Centuries/Two Continents* (1977).

The changing domestic technologies of heating, lighting, plumbing, food preparation, and garbage removal and the artifacts such changing processes produced likewise merit study. For instance, one might encourage students to speculate on how innovations in heating and lighting technology drastically interrupted the evening orientation of the family towards a shared, communal space and even to the center of that particular room, thereby prompting major implications for parent-child and sibling relationships.

Women's studies can be appropriately integrated into an American history course through the house museum. Here the ideas of William and Deborah Andrews, "Technology and the Housewife in Nineteenth-Century America" (*Women Studies*, 1975), might be contrasted with Ruth Cowan, "The Industrial Revolution In The Home: Household Technology and Social Change in the Twentieth Century" (*Technology and Culture*, 1976). Primary sources, ranging from domestic manuals (e.g., Catherine Beecher and Harriet Stowe's *The American Women's Home*) to popular home magazines (e.g., *Godey's Lady's Book*) to etiquette and courtesy books (e.g., Benjamin Wadsworth, *The Well-Ordered Family*) provide a wider cultural context for artifacts associated with "women's work." Trade catalogs, popular advertisements, trade cards, and mail order catalogs are other avenues into household material culture.

Student Projects

In order for students to comprehend artifacts as historical documents in house museums, they require at least two basic skills: 1) the ability to "read" individual objects; and 2) the ability to "read" what archaeologists often call an "assemblage" of artifacts. Beginning exercises for having students think systematically about any single artifact have been developed by E. McClung Fleming, "Artifact Study, A Proposed Model" (*Winterthur Portfolio*, 1975) which recommends a five-fold classification system of the basic properties of any artifact (e.g., its history, material, construction, design, and function) and a set of four operations (e.g., identification, evaluation, cultural analysis, interpretation) to be performed on these properties. Fred Schroeder's AASLH Technical Leaflet (#91), *Designing Your Exhibits: Seven Ways To Look At An Artifact* (1977), is another analytical tool to help beginners study objects, and there are several ideas in the chapter on "Cultural Artifacts" in Stephen Botein et al, *Experiments in History Teaching* (1977).

Once students become conversant with individual artifacts, other exercises can be prepared to have them consider larger assemblages of material culture. Within the house museum this is often a period room, a floor of rooms, and ultimately all the artifacts contained in the total house environment. Lizabeth Cohen's suggestions for "Reading a Room: A Primer To the Parsonage Parlor" in Old Sturbridge Village's *Rural Visitor* (1975) offers a flexible pedagogy. Scott Swank, at the Education Division of the Winterthur Museum, has devised a four-page "Room Study Checklist" to guide his students in the probing of five major categories (spatial characteristics, utilitarian purposes, formal characteristics, furnishings, and history of functional concepts) of a historic house room. He divides the class into research teams, charging each to research the room in one of the five categories. After several weeks of independent study, the teams submit their research reports, which, in turn, serve as the "texts" for several seminar discussions on the room and its objects.

One way of demonstrating the technological and consumer revolution in the American home is to provide students with reproductions of inventories for a cross-section of American parlors and kitchens and, if extant, of such rooms in the specific historic house that they are investigating. Prior to a discussion and evaluation of this data, each student might be requested also to complete an inventory form listing all the domestic appliances and household accoutrements in his or her present home. Provocative historical comparisons can then be reviewed between past and present American attitudes toward personal comfort, material abundance, energy consumption, and even waste disposal. Here it is also useful to have students read chapter five of James M. Fitch's *Architecture and the Esthetics of Plenty* (1961) in conjunction with part two of David M. Potter's *People of Plenty: Economic Abundance and the American Character* (1954).

Bibliographical Resources

American cultural historians have occasionally used household artifacts in their interpretations, and their work can be employed to expand students' knowledge of American residentiality. Pioneer studies by Alan Gowans, *Images of American Living: Four Centuries of Architecture and Furniture as Cultural Expression* (1963), and John Kowenhoven, *Made In America: Arts In Modern American Civilization* (1948), have been followed by J. C. Furnas, *The Americans: A Social History, 1587-1914* (1969), and Daniel Boorstin's *The Americans: The National Experience* (1965), and *The Americans: The Democratic Experience* (1973). Russell Lynes' *The Domesticated American* (1977) and *The Tastemakers* (1954) are full of helpful ideas on the nineteenth century while James Deetz's new book, *In Small Things Forgotten: The Archaeology of Early American Life* (1977), is a delightful introduction to seventeenth-century material culture, ranging from kitchen stools to musical instruments, cuts of meat to refuse dumps.

The interaction between technology and culture can be traced in various ways in a house museum. In addition to Giedion and others cited above, see Melvin Rotsch, "The Home Environment" and Anthony Garvan, "Effects of Technology on Modern Life, 1830-1880" in Carroll Pursell and Melvin Kranzberg, *Technology in Western Civilization* (1967); Albert E. Parr, "Heating, Lighting and Human Relations," *Landscape* (1970); and Ian Quimby and Polly Earl, eds., *Technological Innovation and the Decorative Arts* (1973). Two recent essays in Charles E. Petersen, ed., *Building In Early America* (1976) are especially valuable to the historic house curator: Eugene S. Ferguson, "An Historical Sketch of Central Heating: 1800-1860," and Loris S. Russell, "Early Nineteenth-Century Lighting."

Curators and teachers interested in women's studies should look at Alice Kenney's "Women, History, and the Museum" in *The History Teacher* (1974), as well as Elizabeth Baker, *Technology and Women's Work* (1964), and Ruth Schwartz Cohen, "A Case of Technology and Social Change: The Washing Machine and the Working Wife," in Mary Hartman and Lois Banner, ed., *Clio's Consciousness Raised: New Perspectives on the History of Women* (1974).

Scholarship on household material culture is ongoing in diverse journals such as *Technology and Culture, Decorative Arts Newsletter, Journal of Interdisciplinary History, New York Folklore Quarterly, Journal of Social History,* and *The Journal of Family History*.

4. GEOGRAPHIC AND ECOLOGICAL RELATIONSHIPS

Inquiry Focus

In *Sticks and Stones*, one of the earliest studies of the relation of American civilization and architecture, Lewis Mumford insisted on relating "individual structures to their urban site or their setting in the rural landscape." He rightly claimed, "The single building is but an element in a complex civic or landscape design. Except in the abstraction of drawing or photography no building exists in a void; it functions as part of a greater whole and can be seen and felt only through dynamic participation in that whole."

In the attempt to use the historic house as a comprehensive learning laboratory, a class should therefore evaluate how its original geographical site and surrounding topography are maintained. The relationship of the house to past and present ecological features of the area ought to be researched. The position of the house vis-à-vis other residences as well as to schools, churches, stores, factories, open or farm land, businesses, and other community institutions should be plotted and studied. Here Wilbur Zelinsky's *The Cultural Geography of the United States* (1973) and Philip Wagner's *Environments and Peoples* (1972) are first-rate primers for beginning students.

With a rudimentary background in historical and cultural geography, students of the historic house and its site can probe questions such as: What was the past landscape of which the residence was a part? How did successive generations of inhabitants experience, perceive, and alter this geographical environment? What kinds of behavior (collective and individual) might such a past landscape evoke from the residents? What types of values underlay the creation and management (or mismanagement) of the past landscape? What, if anything, survives to portray or symbolize the past landscape(s) of the home?

Since historic house museums are scattered all over the United States, any investigation of a local site must be guided by the available regional, state, and local geographical research. Two works, however, deserve mention: John Fraser Hart's *The Look of the Land* (1975) is especially valuable for anyone studying a house in a rural environment, while Grady Clay's *Close-Up: How To Read The American City (1970)* supplies many visual clues to look for in interpreting the past and present cityscape. For example, Clay's definitions of "turfs" and "beats" are applicable to the environmental, psychological, economic study of any American residence. His work, like that of the historical geographers and landscape historians cited below, forces students to view a historic house in terms of settlement morphology, land usage, zoning ordinances, subdivision practices, land values, and building codes.

Student Projects

In order to better understand the historical evolution of a residence's environmental relationships, students can learn to depict a historic structure in various cartographic presentations. Successive *location maps* relating the house and its property boundaries in reference to transportation networks, the natural topography, and other settlements can be prepared for each of the important historical eras of the home's existence. *Plot plans,* drawn to a more detailed scale, should also be researched and historically significant site features (natural and man-made) represented cartographically. To reconstruct such plans and maps, students will have to consult still another fascinating cache of historical evidence: cadastral surveys, city and county atlases, land ownership maps, plat books, fire insurance and ward maps, panoramic and bird's-eye-views, and, where available, streetscape, landscape, and aerial photography.

Such exercises require students to think about a home's exterior spatial relationships and how they may have shifted over time; for instance, they can explore the proportions of front yards to back yards to side yards; the position of porches, patios, courtyards, and play areas; the location of outbuildings of all types—carriage houses, servants' quarters, gazebos, privies, root cellars, garages, or spring houses; the role of property lines, fences, and hedges; and, of course, types of lawns, gardens, and landscape plantings.

In addition to mapping all of the residential features by various means (landscape plans, survey drawings, grade levels, topographic features, isometric drawings), students should also be encouraged to construct three-dimensional models of the historic house site at different historical periods. John T. Stewart offers still another possible class project in his suggestions for exploring, "Landscape Archaeology: Existing Plant Material on Historic Sites As Evidence of Buried Features and As Survivors of Historic Species" (*APT Bulletin* 1977).

Bibliographical Resources

Douglas R. McManis, *Historical Geography of the United States, A Bibliography* (1965); G. S. Dunbar, "Illustrations of the American Earth: An Essay in Cultural Geography," *American Studies International* (1973); Alan Kublikoff, "Historical Geography and Social History: A Review Essay," *Historical Methods Newsletter* (1973); and John A. Jakle, *Past Landscapes* (1973), are the bibliographical surveys to consult on the historical and cultural geography of American housing. Ralph Brown, *Historical Geography of the United States* (1948), is the standard reference work (although it only covers the period 1600-1870), and the best historical atlas is still Charles Paullin's *Atlas of the Historical Geography of the United States* (1932).

Of special interest to students of American residential patterns are several articles in *Landscape* magazine: Peirce Lewis, "Common Houses, Cultural Spoor" (January: 1975); J. B. Jackson, "The Domestication of the Garage" (Winter: 1976); Melvin E. Hecht, "The Decline of the Grass Lawn Tradition in Tucson" (May: 1975); Pamela West, "The Rise and Fall of the American Porch" (Spring: 1976); and J. B. Jackson, "A New Kind of Space" (Winter: 1969). An interesting way of connecting environmental psychology perspectives on the domestic built environment with historical geography is suggested by James S. Duncan's "Landscape Taste as a Symbol of Group Identity," *The Geographical Review*, (July: 1973).

Since so many historic house museums were originally built in cities, or now, due to urbanization, are located in cities, the work of urban geographers is frequently of special use to the house museum curator. Useful for teaching purposes are Raymond Murphy's *The American City, An Urban Geography* (1966), John R. Borchert, "American Metropolitan Evolution," *Geographical Review* (1967), and Thomas J. Schlereth, "The City As Artifact," *AHA Newsletter* (1977). On student use of rural cartography see Althea Stoechel's report, *A Study of Delaware County, Indiana* (1971), on her work with students in a laboratory course in American history at Ball State University.

In addition to the leading American geographical journals, valuable articles about domestic building sites can be found in *Environmental History, Landscape Architecture*, the *APT Bulletin*, the Association for Living Historical Farms and Agricultural Museums' *Annual Proceedings*, and the recently revived magazine, *Landscape*, formerly edited by J. B. Jackson.

5. LITERARY AND SYMBOLIC INTERPRETATIONS

Inquiry Focus

Grady Clay makes a special point in his study of the built environment that certain structures, monuments, or physical areas "carry huge layers of symbols that have the capacity to break up emotions, energy or history into a small space." The symbolic dimension of cultural experience has been a favorite approach of American studies scholars such as

Henry Nash Smith, John William Ward, and Leo Marx. The methodology has also been successfully applied to an artifact by Alan Trachtenberg who, in his influential study, *The Brooklyn Bridge: Fact and Symbol* (1965), demonstrates how this late nineteenth-century monument became both a historical fact and a cultural symbol to the local New York community and to Americans at large. Harold R. Shurtleff's *The Log-Cabin Myth* (1967) is a parallel analysis of a more common and yet equally compelling cultural symbol in the American historical imagination. The cultural symbol approaches can often be applied to the interpretation of historic houses. The symbolic overtones of Mount Vernon, William McGuffey's log cabin, a Van Cortlandt manor, The Hermitage, or San Simeon are obvious; many other house museums have been, or are becoming important civic and cultural symbols to past and present local community residents.

The American house has also figured strongly as a symbol in American literature. Washington Irving's *Bracebridge Hall*, Edith Wharton's *The House of Mirth*, William Dean Howells' *The Rise of Silas Lapham*, Nathaniel Hawthorne's *The House of the Seven Gables*, Henry James' *An International Episode*, and William Faulkner's *The Mansion* deliberately employ American architecture to frame a fictive understanding of American life. Short stories like Edgar Allen Poe's "The Fall of the House of Usher," Herman Melville's "I and My Chimney," or George Washington Cable's "Belles Dames Plantation" provide other insights. Poets ranging from James Whitcomb Riley ("Poems Here at Home," 1893) to Adrienne Rich ("From An Old House in America," 1974) also can be used as literary indices of American domesticity.

Jean Mudge, for instance, has done a provocative study on *Emily Dickinson and the Image of Home* (1975). Ms. Mudge's interdisciplinary approach draws in part upon insights she gathered while actually living in the Dickinson homestead in Amherst. Her model study, which might be applied to other houses of creative writers such as Mark Twain, Washington Irving, or Henry Longfellow, discusses not only the architectural ambience of the extant house but also various versions of "home" as a central image cluster in Dickinson's poetry and her use of spatial and residential metaphors.

Student Projects

A seminar can research the symbolic meaning of a historic house from whatever documentary materials may survive: diaries, correspondence, promotional brochures, county and city histories, local biographical dictionaries, and magazine and newspaper accounts. The building may have been a favorite subject for local lithographers, artists, and photographers, and their changing renderings (including distortions) and perspectives (including exaggerations) provide a class with, not only clues to local artistic history, but also still other evidence whereby to analyze cultural symbolism.

Occasionally the original owners of the historic house were the deliberate or unconscious promoters of new architectural or social trends for the local community. Their house came to "stand" for something, and everyone knew it. Consequently the house form or its architectural style is deliberately replicated in the neighborhood by envious peers who wished to make statements about their own cultural, economic, and social status. Of course, a historic house may also inspire architectural progeny that humble the parent. The key point, however, is that the historic house be studied in its cultural and symbolic relations with surrounding structures in order to understand its cultural implications. Such understanding can frequently be gathered by systematic oral history interviewing of older neighborhood residents. Such fieldwork frequently turns up valuable records (most often photographs) of the historic house as well as reminiscences of its communal meaning.

Curtis Dahl has developed a senior seminar, "American Novels/American Houses," at Wheaton College (Massachusetts) where students do research in literature, biography, local history, photographic collections, and architectural literature in order to explore how literary, pictorial, and artifactual sources can be combined for a larger comprehension and keener appreciation of both fiction and architecture. Dahl notes (*Society of Architectural Historians Newsletter*, October 1977) that since the great bulk of architecture in fiction is vernacular, this approach to American domestic building emphasizes, as conventional architectural history courses do not always do, the ways that ordinary buildings have a great impact on cultural consciousness.

Bibliographical Resources

Charles Moore and Gerald Allen, *The Place of Houses* (1974), helps students raise the right questions about historic houses as special places laden with cultural implications. So does Clare Cooper in an article, "The House as Symbol" (*Design and Environment*, 1972), and Kenneth Lynch in a book, *The Images of the City* (1960). Theo Crosby, *The Necessary Monument: Its Future in the Civilized City* (1970), and Marvin Tractenberg, *The State of Liberty* (1976), also describe the process whereby structures become civic and cultural landmarks.

The applicability of the "myth and symbol school" of American studies scholarship to American residential history can be found in portions of Leo Marx, *The Machine in The Garden: Technology and the Pastoral Ideal in America* (1964); John Kouwenhoven, *Made In America: The Arts in Modern Civilization* (1948); Howard Mumford Jones, *O Strange New World: American Culture, The Formative Years* (1964), *The Age of Energy: Varieties of American Experience, 1865-1915* (1970); and John F. Kasson, *Civilizing the Machine: Technology and Republican Values in America,* *1776-1900* (1976).

Other novels that might be used in a course built around the history of the American domestic residence range from Laura Ingalls Wilder's *The Little House on the Prairie* and Washington Irving's *The Sketch Book* to Willa Cather's *The Professor's House* and Arthur Meeker's *Prairie Avenue*. Sections of Booth Tarkington's *The Magnificent Ambersons*, William James' *Washington Square*, William Faulkner's *The Sound and the Fury*, Theodore Drieser's *Sister Carrie*, and William Dean Howells', *A Modern Instance* are also appropriate. Autobiographies as diverse as Henry Adams' *The Education of Henry Adams* and Alfred Kazin's *A Walker In The City* contain moving evocations of American homes and their symbolic meaning to their residents.

Several literary scholars have demonstrated how architectural metaphors have been cardinal images of value for important American writers; see Vicki Halper Litman, "The Cottage and the Temple: Melville's Symbolic Use of Architecture," *American Quarterly* (1969); William E. Bridges, "Warm Hearth, Cold World: Social Perspectives on the Household Poets," *American Quarterly* (1969); and three essays by Allen Guttmann: "Images of Value and the Sense of the Past," *New England Quarterly* (1962); "Washington Irving and the Conservative Imagination," *American Literature* (1964); and chapter II of *The Conservative Tradition in America* (1967).

6. ARCHITECTURAL FEATURES AND STYLES

Inquiry Focus

The first question often raised about a historic house is its architectural style. Another approach would be to postpone such study until a detailed investigation has been conducted on the building as an artifact of demographic, technological, environic, social, and cultural history. Inferences drawn from this cross-disciplinary analysis can then be compared and contrasted with the aesthetic ambience and the architectural style of the structure.

Building terminology, stylistic nomenclature, and structural principles must be mastered before any in-depth architectural analysis can proceed. John J.-G. Blumenson's slide/tape kit, *Architectural Description: Domestic* (AASLH, 1976) is a useful program (cassette, slides, script, and bibliography) that defines the basic architectural vocabulary of American residential structures. Beginners find Blumenson's approach especially valuable since he moves from general characteristics (overall design types, story arrangements, materials, roofs, etc.) to specific features (porches, chimneys, windows, doors, etc.).

Students should be shown how stylistic designations aid in relating buildings—particularly of different chronological periods surrounding a historic house—to one another. But more than that, a seminar should come to realize that stylistic classifications acknowledge building as not just a craft but an art form that reflects the philosophy, intellectual currents, cultural aspirations, and historical associations of its time. Careful stylistic analysis, forcing as it does a consideration of early, middle, late, neo- and proto-styles quickly convinces students that stylistic periods, like most other manifestations of social change in the past, do not have sharp chronological demarcations.

Investigation of architectural designs, motifs, and features must go beyond mere "facadism," a common fault that John Maass ("Where Architectural Historians Fear to Tread," *Journal of the Society of Architectural Historians*, March: 1969) rightly sees in much American architectural scholarship. Structural aspects of a residence must not be slighted: how technical developments affected architecture as a visual art should be explored; what problems may have arisen in the construction of the building should be speculated upon; the relation of the style chosen and the structural principles demanded by climate and available materials should likewise be evaluated. Where architectural drawings survive, students should try to calculate what happened between the architect's plan on paper and the actual completion of the building. Where the historic house appears in debt to pattern-book literature, these influences should be carefully traced. Where the homestead is the work of an anonymous builder, an attempt should be made to recreate the stylistic template of the individual or individuals who designed and erected the structure. More research also needs to be done on aesthetic and design proclivities of local contractors, sub-contractors, and craftsmen who may have been involved in creating the total aesthetic ambience of the building.

Student Projects

Individual research projects can be assigned to trace, via drawings and chronological charts, various stylistic components and iconographic features of the historic house. For example, a detailed art history of cornice forms, arch types, brick patterns, chimney crowns, dormers, fascia details, stairway newels, mullion arrangements, or quoin styles can become the basis for an extended class exploration of the entire several-thousand-year history of Western design and decoration. Another exercise would be to divide a class into two research teams: one to investigate the stylistic features of the exterior of the building; the other team to probe the origins, development, and forms of such features within the home's interior. After the research is completed, extended seminar discussions should explore the relation between the two.

The historical associations that many American architectural styles sought to evoke can be another fascinating technique of connecting later phases of American history with earlier periods (e.g., Georgian, Dutch-Colonial, Mission, English-Colonial, Pueblo, Spanish-Colonial) and of American history with European history (e.g., Renaissance Revival, Romanesque, Egyptian, Second Empire, Gothic, Greek Revival). As Laurence Lafore suggests in his study of the domestic architecture of Iowa City, Iowa, (*American Classic*, 1975), "a single dwelling may instruct us in the history of mankind: in the glories and sometimes the depravities of past generations; in discoveries of engineers and chemists; in sociology and economics and taste; in the genius and folly of nations and individuals." The Victorians were particularly enamored of historical associationism in their structures and any curator of a nineteenth-century historic house museum should consult Peter Conrad's *The Victorian Treasure-House* (1973). From it, curricular exercises can be extracted to show students how to take apart a Victorian home for its multiple parts, many of which are, of course, much older than America itself.

As has been proposed in several previous teaching strategies for the historic house museum, such historical study should be again linked to students' own domestic environments. Florence Ladd has developed a class assignment for her students in architecture and planning that can be easily adapted to an American history course based in a historic house. As outlined in an essay, "Doing Residential History: You Can Go Home Again," *Landscape* (Winter: 1976), Ms. Ladd demonstrates how having students explore the personal past living environments that they and their parents have experienced expands their sensitivity to the history of American domestic space. Her work can be supplemented by a study like Edward O. Laumann and James S. Morris, "Living Room Styles and Social Attributes: The Patterning of Material Artifacts in a Modern Urban Community," *Sociology and Social Research*, (April, 1970).

Bibliographical Resources

The American Technical Society's *Architectural and Building Trade Dictionary* (1974) defines building terminology from Aaron's rod to zonolite concrete. Henry Russell-Hitchcock, *American Architectural Books* (1946), is the best catalog of pattern books and nineteenth-century design manuals. Many pattern books by important American architects (Asher Benjamin, Minard Lafever, Richard Upjohn, etc.) are currently being reprinted in facsimile editions by Dover Press and the American Life Foundation.

Guides to the American historical styles have proliferated with the advent of the historic preservation movement. Among the most useful for the student of American domestic architecture are: John J.-G. Blumenson, *Identifying American Architecture: A Pictorial Guide to Styles and Terms, 1600-1945*, 1977; John Poppeliers et al., *What Style Is It?* (1977); and Marcus Whiffen, *American Architecture Since 1780: A Guide to the Styles* (1969).

Various techniques for deploying architecture in the teaching of American history can be adapted from articles in the *Journal of Architectural Education*. One should also consult Richard Rabinowitz, "The Crisis of the Classroom: Architecture and Education," *History of Education Quarterly*, 14 (Spring: 1974). Periodicals that often deal with American domestic architecture include: *American Architect, Historic Preservation, Architectural Forum, The Old House Journal, Architecture and Building, Journal of the Society of Architecture Historians*, and the *Journal of the American Institute of Architects*.

The best local studies of residential architecture in America are: Roger Kennedy, *Minnesota Houses* (1967); Wilbur D. Peat, *Indiana Houses of the Nineteenth Century* (1962); Bainbridge Bunting, *Houses of Boston's Back Bay: An Architectural History* (1967); Charles Lockwood, *Bricks and Brownstone: The New York Row House, 1783-1929* (1972); I. T. Frary, *Early Homes of Ohio* (1936); Antoinette F. Downing and Vincent Scully, Jr., *The Architectural Heritage of Newport, Rhode Island, 1640-1915* (1952); Bernard Foerster, *Architecture Worth Saving in Rensselaer County*, New York (1965); D. B. Alexander, *Texas Homes of the Nineteenth Century* (1966); Victor Steinbrueck, *Seattle Cityscape* (1962).

Architectural history can also be combined with humor as the delightful parodies and spoofs by Osbert Lancaster (*A Cartoon History of Architecture*, 1975) and Terence Harold Robsjohn-Gibbons (*Homes of the Brave*, 1954) aptly demonstrate.

7. MUSEUM INTERPRETATION ANALYSIS

Inquiry Focus

A historic house possesses at least two histories: its past existence as an actual residence and its past and present life as a house museum. The history of the changing interpretations of a historic house museum is a final method of showing students both the problems and the possibilities in researching the past and of communicating that knowledge primarily through physical history.

A class can start by reviewing how the particular arrangement and display of artifacts, the conducting of visitor tours, the types of audio-visual programs, and the nature of available published materials are used in the current interpretation of the historic house. In this comprehensive perspective, the class evaluates the house museum as a curatorial publication, analyzing the form and content of the historical interpretation with much the same critical rigor as they might review a historical monograph.

Using all the skills that they have developed in the previous six approaches, students can be encouraged to try to decipher the epistemological assumptions and possible historical biases of the curators, exhibit designers, or architectural historians who have restored and refurnished the historic house. An attempt should be made to identify any evidential gaps that a curator might have faced in preparing the historical interpretation. The nature of documentation for the historical generalizations conveyed in the interpretation should be critiqued. How well the historic house works as an educational environment for various learners (e.g., from school children to adults) should be reviewed and discussed.

Historical museums, while devoted to the cause of expanding the public's historical consciousness, are often curiously myopic about their own histories as institutions. Little attention is paid to the origins and development of most house museums as part of both the history of American museums and of American cultural history. James S. Smith's "The Museum As Historian" (*San Jose Studies*, 1976) is one of the few essays that attempts to comment on how the organization of present day museums reveals the attitudes that Americans have held and continue to hold toward the past. History students are inevitably interested in and can be instructed by probing such a historical topic.

Previous site plans, models of earlier building arrangements, photography of earlier period rooms, and the like provide an intriguing entry into local and national history. Moreover, this component of the historic house can be a marvelous introduction for students to museum studies and the work-aday work of museum professionals. The curatorial and educational staff of the Camron-Stanford House in Oakland, California, are currently developing such an approach. For example, they are using period rooms such as a "colonial kitchen" (once a part of their house but now installed nearby in the Oakland Public Museum) as a teaching exhibition space devoted to involving visitors in their building's history as a museum. They plan to interpret and display permanently the techniques and artifactual remains of the first curators of their house: items such as traveling teaching kits, circa 1910; early exhibit cases and object taxonomies; and an extensive photographic collection. Documentary materials such as collection policies, project plans for the museum's physical expansion, staff reports, and memoranda on educational policies may also be exhibited.

Student Projects

Teaching students the techniques for evaluating house museums as interpreters of the American past can be done by acquainting them with the critical appraisals of David Lowenthal, Richard Rabinowitz, Peirce Lewis, and Irwin Richman, each of whom has been particularly concerned with what Lowenthal calls "the American way of history" and how it is presented by museums. A comprehensive outline of evaluative criteria for a class project to evaluate a historic house's interpretation can be adapted from Thomas Leavitt's proposals (*Technology and Culture*, 1968) for systematic exhibit review of museums. With such criteria as guidelines, students can be required to prepare written evaluations of a house museum's interpretation for a seminar discussion in which the museum curatorial and educational staff should also be involved. Students should be pressed to offer specific recommendations for improving an interpretation if they find it deficient.

Suprisingly little serious scholarship, outside the work of Alma Wittlin and Whitfield Bell, has been done on the cultural history of American museums. There is still less on the history of historical museums, except Laurence Coleman's pioneering compendium of the 1930s and Richard Rabinowitz's recent essay, "That the Past May Learn from the Present: History Museums in the United States," *History of Education Quarterly* (1978). Such reading can be assigned for class discussion since it will provide students with an introductory context for another long-term class project: the writing of a history of the house museum that they have been using as a learning laboratory. As a team of cultural historians, the students should be encouraged to study their historic house museum in the context of the United States historic preservation movement, general trends in American historiography, and the cultural history of nineteenth- and twentieth-century America. Such a comparative analysis might turn up intriguing parallels and paradoxes as well as suggest a different angle of vision on the American past. In any event, students would quickly learn that there is a changing historiography in museum interpretation just as there is in historical monograph literature.

Bibliographical Resources

In order to initiate students into the history of museums, one should consult standard references such as Alma S. Wittlin, *Museums: In Search of a Useable Future* (1970); Whitfield J. Bell, Jr. et al., *A Cabinet of Curiosities: Five Episodes in the Evolution of American Museums* (1967); Laurence V. Coleman, *The Museum In America* (1939); and Herbert and Marjorie Katz, *Museums, U.S.A.* (1965).

Critical perspectives can be found in essays by David Lowenthal on "The American Way of History" *(Columbia University Forum*, Summer: 1966) and "Past Time, Present Spaces, Landscape and Memory" *(The Geographical Review*, January: 1975). Other critiques can be extracted from Peirce F. Lewis, "The Future of the Past: Our Clouded Vision of Historic Preservation," *Pioneer America* (July: 1975); Richard Rabinowitz, "Learning in Public Places: The Museum," (Unpublished paper delivered at American Educational Research Association, New Orleans, La., 1973); and Frank Barnes, "Viewpoint: Living History, Clio or Cliopatria," *History News* (September: 1974).

Charles F. Montgomery's short essay, "The Historic House—A Definition" (*Museum News*, 1959), offers students a four-part classification of historic house types, while A. E. Parr provides a good overview in "History and the Historical Museum," *Curator*, (March: 1972). On interpretive techniques, see Freeman J. Tilden, *Interpreting Our Heritage* (1967); and William T. Alderson and Shirley Payne Low, *Interpretation of Historic Sites* (1976). In order to acquaint a class with the development of the period room and its role in museum interpretation, consult E. P. Alexander, "Artistic and Historical Period Rooms," (1964); and A. E. Parr, "Habitat Group and Period Room" (1963), both published in *Curator*.

Techniques for helping students interpret a house museum's interpretation can be borrowed from two essays by Thomas J. Schlereth, "The Historic Museum Village as a Learning Environment" (*Museologist*, Spring: 1977) and "Historical Museum Villages as Textbook History" (*Museum News*, February: 1978). Excellent suggestions can also be found in Lizabeth A. Cohen, "How To Teach Family History By Using An Historic House" (*Social Education*, December: 1975) and a primer, "Field Study at Historic Houses" in the Winter (1975) edition of *Almanac* published by the Museum Education Center, Old Sturbridge Village.

History News, *Curator*, *Museum News*, and the *Museologist* are the principal journals of the American museum profession where articles on interpretation and museum history can be found. *The History Teacher*, *The Society of History Education News Exchange*, *Social Education*, and *Teaching History: A Journal of Methods* are other journals that often contain how-to-do-it essays on using museums in history teaching. See also Linda F. Place, et al., "The Object as Subject: The Role of Museums and Material Culture Collections in American Studies," *American Quarterly* (August: 1974), and Mary Lohmann, *A New Look At History* (1975).

* * * *

The seven teaching strategies outlined here can be variously combined in different classroom situations in programs in American history and American studies wherever a historic house is in close proximity. With modifications to accommodate the local context, this comparative, multidimensional approach permits teachers to integrate the significant scholarship on the study of artifacts and architecture into a historical framework wherein theoretical studies can be tested against actual material culture evidence. Moreover, the emphasis on the house as an anthropological site often enables students to bring to bear on their study of history and art other courses that they are pursuing in the social sciences. Readings in cultural anthropology, historical archaeology, sociology, environics, and cultural geography force a student to confront a historic house museum with a broader series of questions and insights than if they were only exposed to reading the traditional architectural history surveys. In the process, students are alerted to the interpretive problems that each house museum curator faces, and how, despite the inevitable biases of exhibition, a structure can be a significant learning environment if the viewer approaches it with an inquiring mind and an observing eye.

Finally, students take away a type of visual literacy from this multidisciplinary approach to a historic house that benefits them in the future: a seminar's combination of readings, class projects, discussions, independent research, and extensive on-site physical investigations of the structure provides them with a critical and perceptive sensitivity to the history that survives among us in architectural form. They invariably also become intelligent, critical, insightful, and enthusiastic visitors to all types of historical museums.

Thomas J. Schlereth is an associate professor and chairman of the Department of American Studies at the University of Notre Dame where he teaches American cultural, urban, and architectural history. He is the author of three books, a biography of Geronimo, an interpretive study of the Enlightenment, and a history of Notre Dame, as well as several articles on the uses of museums and artifacts in the teaching of history. He is currently completing a book entitled *The City As Artifact*.

TECHNICAL LEAFLET 105

Technical Leaflets are published by the American Association for State and Local History for the purpose of bringing useful information to persons working in the state and local history movement. The series does not follow the same categories month after month, since the selection of subject matter is based upon varied inquiries received by the Association's home office. The leaflets, which are detachable from the magazine, are copyrighted © 1978 by AASLH and should be catalogued as part of HISTORY NEWS.

American Association for State and Local History Technical Leaflet 105, HISTORY NEWS, Vol. 33, No. 4, April, 1978. *Historic Houses As Learning Laboratories: Seven Teaching Strategies*.

Reprints are available for $.50 each. For information on bulk rates, write to the Association at 1400 Eighth Avenue, South, Nashville, Tennessee 37203.

A A S L H

TECHNICAL LEAFLET

AMERICAN ASSOCIATION FOR STATE AND LOCAL HISTORY

REACHING TEACHERS: HELPING THEM TEACH STATE AND LOCAL HISTORY

By Elise Schebler Dawson

RULE 1. There is no single best way to reach teachers.
RULE 2. Do not try to reach them through the school principal.

While museums and historical societies would like to work closely with classroom teachers, sometimes that audience is difficult to reach. At the State Historical Society of Iowa, we have increased our offerings to teachers and students and have learned to follow the above rules. This technical leaflet is intended to provide ideas for finding teachers and attracting their attention, and selecting materials and programs to satisfy their curriculum needs. It also presents information about an initiative by the State Historical Society of Iowa to combine the talents of historians and education professionals to serve the needs of Iowa history teachers.

FINDING THE TEACHERS AND ATTRACTING THEIR ATTENTION

In order for teachers to use your programs and facilities, you must first locate them and attract their interest. There are a variety of ways to reach teachers and each method used will reach and interest a different group of teachers. The wider variety of methods used, the more teachers that are ultimately reached.

Brochure

At the State Historical Society of Iowa, a school tour brochure was developed in conjunction with our museum tour program. This brochure provides basic tour information: how to schedule a tour, what is on exhibit, the tour hours, and the street address of the museum. We distribute this brochure to every school in the state.

When designing a brochure, keep in mind that teachers receive mail from many different organizations. For a brochure to be effective it should be:

- *Eye-catching:* Use colored paper instead of white. Use photos and drawings to break up blocks of text and create visual interest.
- *Audience appropriate:* Emphasize what teachers and their students can do at your facility. Photos should represent the programs you are promoting.
- *User-friendly:* Select type styles that are easy to read. Be sure pertinent information is clearly visible.
- *Within your organization's budget:* Well-chosen graphics and text reproduced on a high quality copier can be just as effective as a color, glossy brochure.

Brochures should be mailed shortly after school starts because many teachers plan their field trip experiences at this time. If the teachers' names are known, use them. For schools where teachers' names are not known, address mail to their position, such as "Social Studies Coordinator" or "Iowa History Teacher." Do not address mail to the school principal. The volume of material that crosses the principal's desk reduces the likelihood that museum materials will be seen and forwarded to the appropriate teacher. Incorrectly addressed mail will end up back on your desk so be sure to have the correct mailing address, including zip code. Print a few extra brochures to be sent out on request.

Teacher Newsletter

Another way to promote your education programs is through a teacher newsletter The newsletter should provide information on specific programs, events, and ideas. Remember that the goal is to help them teach history. Use these ideas for an effective newsletter:

- Keep newsletter to two to four pages in length.
- Include brief articles concerning information pertinent to the teachers' needs—describe upcoming exhibits, new local history materials, workshops for teachers, items in your gift shop.
- Select a name for the newsletter that people can recognize and will remember.
- Include graphics that enhance the information presented.
- Send to a specified mailing list two to four times per year.

At the State Historical Society of Iowa, we started *The Link,* a newsletter for teachers in 1990. As with many new projects, it took time for the newsletter to acquire a following. It was published for two years before teachers began to respond to it. *The Link* is now published twice a year, in September and January, coordinating with the beginning of first and second semesters for most Iowa schools. It is sent to teachers who have used our programs as an incentive to continue the relationship.

Local and State Education Offices

Local and state education offices can be used as an alternative to bulk mailing to distribute brochures, newsletters, and other information. Contact the office's curriculum coordinators who frequently communicate with the teachers in their curriculum area and may be able to send information for you. Local and state education offices also frequently have a "mailbag" system that distributes information to each school. If you have a flyer that you want placed directly into the hands of students and their parents, check to see if your local district has a "backpack" system. Be sure to ask these questions when you make your contact:

- Do you provide them with an original, or make your own copies?
- How many copies should you provide?
- What size limits exist?
- What are the deadlines and when is distribution?
- Where are they distributed?
- Is there any fee for this service?
- Who should the material be sent to?

Professional Education Organizations

To cultivate personal contact with teachers, attend the annual meetings of local, state, and regional education associations. Most of these meetings have sessions on methods by which teachers can improve their teaching. You may be able to present a session on your organization's programs and materials. Some conferences also include an exhibit hall where booth space can be rented. This is a good opportunity to bring examples of materials and acquire names for your mailing lists. Our most successful contacts have been made at these meetings.

Mass Communication

When time is limited, take advantage of mass communication networks. Send news releases to local newspapers, radio, and television stations. The news release should include the information about the program, as well as the name and phone number of the contact person. If the phone is answered on a limited basis, be sure to include the hours that they can call.

The same information can be included in a small, paid newspaper advertisement. The advantage of the advertisement is that you have control over the content and timing. The disadvantage is the expense. Your local newspaper may offer a discount price to non-profit organizations.

Take advantage of informal communication networks. Word-of-mouth advertising through others who have used your programs can be the best advertisement for your organization.

Selecting Programs and Materials

Identifying Curriculum Needs

Teachers are most likely to attend programs and use materials that meet their curriculum needs. Identifying those needs can easily be accomplished through a teacher survey. The State Historical Society of Iowa sends a survey every two years to teachers currently using our facilities and programs. We have found surveys very useful for obtaining information. The information is evaluated and implemented in order to improve our programs and develop new ones. When planning a survey, keep these points in mind:

- Timing of surveys is crucial. Do not send just before a major holiday or school break.
- Keep survey short, but ask enough questions to get the information you need. You might like to know—
  - What subject areas are being taught?
  - What grade levels?
  - What format of programs and materials is best?
  - Which teachers are willing to help?
  - When are people available?
  - Do programs and materials need to be free, or can they afford a small fee to cover costs?
- Avoid open-ended questions if you are sending to many people. This makes evaluation difficult.
- Only ask questions about things you intend to do something about. If you don't intend to start summer internships, don't ask about them as you will create an expectation.
- Include a stamped, self-addressed envelope for the best return response.
- Set a return date.
- Be prepared for a good return rate. We usually get a 60 percent response, which far exceeds the usual return rate for a survey.
- Plan a follow-up to inform people how you used the information.

Once you have gathered this information, you can begin to plan programs. Consider some of the following ideas.

Exhibit Brochures and Teaching Materials

Pre-visit materials for the exhibits help teachers prepare for their visit and incorporate the museum exhibits into their lessons on local history. These can be produced inexpensively on a photocopier and stapled or paper-clipped. If they are produced on three-hole-punch paper, a teacher can file them in a notebook with other lesson plans, thus increasing the likelihood that the materials will be saved and used each year. The information can be updated easily, because it can be changed one page at a time. Ask local teachers if they will volunteer their time to help you write these. Be sure to give them credit! Teaching materials can include:

- Goals and objectives for the exhibit/visit.
- A summary of the exhibit—what artifacts they will see.
- Vocabulary list of important or new words.
- Pre-visit activities—what to do before they visit.
- Post-visit activities—what to do when they get back.
- Resource list—books, magazines, films or places that will help them teach about the subject.

Existing Materials of Local Interest

Teachers are sometimes unaware of existing local history materials. Assemble a bibliography of those materials, organized by subject matter or grade-level appropriateness. Include the title, author, and publisher whenever appropriate. Always include the location of those materials, such as "public library" or "city hall." A two or three sentence synopsis of the work will also be helpful. If your organization owns many of these materials, consider placing them in a lending library with checkout and return procedures. Make sure all materials are marked with your organization's name and address.

Traveling Artifact Trunks

If the teacher and students can not visit the museum, consider taking the museum to them in the form of a traveling artifact trunk. These trunks should focus on one topic, such as "Toys of the Great Depression." Include several reproductions or artifacts, descriptions of the artifacts and how they were used, some background information about the topic, and photographs or drawings of the item in use. Include instructions for the teacher outlining how to use the trunk. The trunk should be sturdy, but not too heavy, with handles on the side for easy carrying, and a secure latch. It should be small enough to fit into a car trunk or back seat, and meet criteria for shipping by postal service or private carrier. Our trunks are 18 inches square and 12 inches high. Investigate best ways of distribution, through mail or carrier, or pick up by the borrower, and determine if a fee will be charged. Managing an artifact trunk program can take a significant period of time during the school year, so be sure to have enough volunteer and staff help.

In-service Session

Many school districts have in-service days for teachers during the school year. Some of these days are designed so the teachers can experience new ideas in teaching. We offer an in-service program on teaching with artifacts entitled "What can we learn from things that don't talk." This session is approximately one hour to one hour and a half and is based on the AASLH Technical Leaflet by Fred Schroeder, *Designing Exhibits: Seven Ways to Look at an Artifact* . During this session, we look at everyday artifacts and offer teachers the opportunity to apply the criteria to the objects. We also provide them with ideas for incorporating this activity into the classroom, including suggestions for using the format in classes other than history. This workshop is one of our most requested and most successful programs, outside of museum tours. When planning a workshop, consider the following:

- Number of people that can be served.
- Where you are willing to travel.
- What materials you will need and their costs.
- Who will give the workshop and when they are available.

Teachers as Summer Interns/Volunteers

If you have an established volunteer program, promote this to teachers in your area. This is a winning situation for all involved. Your organization gets much needed help, and the teachers have the opportunity to learn more about the local history, your collections, and other programs. The sharing of ideas will increase the opportunities to work together.

The State Historical Society of Iowa's Committee on History Education

In an effort to develop a closer working relationship with teachers of Iowa history, the State Historical Society of Iowa initiated the formation of a committee on history education. The committee is comprised of several classroom teachers, university instructors of educational methods, an elementary school principal, the state social studies coordinator, a representative of the Iowa Council for the Social Studies, and two staff members of the State Historical Society of Iowa. The committee meets quarterly.

When formed in early 1992, the committee established a set of goals and objectives. These goals were based on information culled from our teacher surveys and the Blue Ribbon Task Force Report on the Teaching of Iowa History. This report addressed the issue of curriculum, teacher training, and resources. With these tools the committee determined that the major initiative for the next few years is to develop a middle school Iowa history curriculum, a wall-size timeline of state history, and a two-week summer teacher institute. These tasks will be completed by the summer of 1995 as a prelude activity to Iowa's sesquicentennial in 1996.

The committee will continue to develop and promote programs for teachers, utilizing many of the methods previously discussed in this report. To be placed on our mailing list, contact The Iowa History Resource Center, State Historical Society of Iowa, 600 E. Locust, Des Moines, IA 50319. ■

Elise Schebler Dawson is curator of education at the State Historical Society of Iowa. She has an M.A. in History Museum Studies from the Cooperstown Graduate Program in Cooperstown, New York, and has worked in museums and historic sites in Iowa and Illinois.

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AASLH
TECHNICAL LEAFLET
A PUBLICATION OF THE AMERICAN ASSOCIATION FOR STATE AND LOCAL HISTORY
#230

Designing a Summer Teacher Institute

By Lisa N. Oakley

Teacher Institute—an intensive, focused, learning experience for teachers offered over a period of consecutive days or weeks.

This technical leaflet serves as a guide for state and local history organizations in designing a summer teacher institute program for elementary and secondary teachers. The dawning of the twenty-first century has witnessed a growth in the variety of professional development opportunities available in the education community, with teacher institutes one of the most prominent. This growth is particularly evident in history education—a field for which institutes provide an opportunity for participants to acquire content expertise while also providing an opportunity for networking and re-energizing in this world of burnout and testing, testing, testing.

For history organizations, there are immeasurable benefits to offering teacher institutes, particularly in the areas of reaching new audiences and building relationships and partnerships with other history organizations, community historians and scholars, and, of course, the teachers themselves. Perhaps most beneficial, however, is the opportunity to expose classroom teachers to the rich resources available in their local community—resources which make the classroom history curriculum relative and personal—the ultimate mission for organizations supporting state and local history education.

This technical leaflet reflects the particular experience of the East Tennessee Historical Society (ETHS) and its award-winning teacher institute program.[1] ETHS's first summer teacher institute was conducted in 1998; this summer institute, as well as six subsequent institutes, was funded in large part through a grant from Humanities Tennessee. Building on the success of this core program, ETHS partnered with the University of Tennessee's Department of History and eight East Tennessee school districts to develop a project featuring multiple summer and academic-year institute opportunities. ETHS serves as project director for this Teaching American History (TAH) grant project which was funded by the United States Department of Education (DOE) in the fall of 2003 and will continue through fall 2006.

Steps in Designing an Institute:

Step 1 *Develop an informed and inspired concept.*

You begin with the general idea or concept of what you would like to offer teachers. This concept should be informed by investigating what has been successfully offered by other organizations, as well as by talking with teachers about their needs. The informed concept creates inspiration. Without inspiration and dedication on the part of staff and stakeholders, you will not be successful.

It is critically important to involve teachers in every step. Teacher advisors can be recruited from the pool of teachers who participate consistently in your organization's programming or through recommendations from a local school system's administration (the best contact is usually a curriculum or instructional supervisor).

Step 2 *Identify possible funding sources.*

Take your informed and inspired concept and answer the question, "What are the possible funding sources?" Institutes are expensive as most offered by historical organizations cover all or a majority of the participants' costs. Historically, teacher institute programs in the social studies have been funded in whole or part through grant programs from agencies such as the National Endowment for the Humanities (NEH) and the state humanities councils. Recently, however, agencies such as the Institute of Museum and Library Services (IMLS) and the United States Department of Education (DOE) are offering grants which fund professional development programs for teachers. For example, the TAH grant program of the DOE has increased the number of professional development opportunities in history education exponentially—with most TAH projects featuring institutes as a centerpiece. Future funding could also come through the recently passed *American History and Civics Education Act* which will provide funding for teacher and student academies focused on history and civics education. Each of these grant programs has unique guidelines, however.

Step 3 *Become familiar with the guidelines of the grant program.*

As you move to step four and begin designing your project, keep the guidelines for your grant proposal in mind. Some answers are determined or at least influenced by the guidelines.

Step 4 *Answer key questions to design your institute program.*

A series of key questions should be answered as you take your institute program from inspired concept to a detailed design from which you can compose a grant proposal and, if funded, take the required steps for implementation. A discussion of each question follows this summary list:

1. What are the goals for the institute program?
2. What strategies or methods will be utilized to meet the stated goals?
3. Is there a specific need for the institute program?
4. What is the topic or theme of the institute?
5. What teacher group is the target audience?
6. When is the best time for your institute?
7. What kind of credit will you offer?
8. Who will you partner with to conduct the institute?
9. How many teachers can participate?
10. What will you require of participants?
11. Will the institute be residential?
12. What resources will you provide?
13. How will you promote and recruit for the institute?
14. What logistical arrangements are required?
15. What methods of evaluation will you use?
16. What funds are required?
17. Does this program meet the mission and unique strengths of your institution?

1. What are the goals of the institute program?

Put in words what you want to accomplish through this endeavor. As you develop the goals, keep in mind you will need to evaluate how effectively you meet them. Many grant programs require formal evaluation plans to be included with the proposal. All ETHS

1 The American Association for State and Local History awarded the ETHS with a Certificate of Commendation for the 2002 teacher institute "Facing Change: The Impact of the New Deal and World War II on East Tennessee."


All photos courtesy of author

Limiting programs to less than twenty-five teachers means that participants can have a good learning experience.

institutes have two basic goals: 1) to increase the content knowledge of social studies teachers, and 2) to encourage the active integration of local history resources (individuals, museums, landscapes, etc.) in the participant's classroom curriculum and instruction.

You can include goals related directly to student understanding and skills in developing your institute design. If you do include goals related to student achievement, be prepared to develop an evaluation plan that will measure this change, a challenging prospect due to privacy laws and the time/effort involved in working with a group outside of the pool of institute participants.

2. What strategies or methods will be utilized to meet the stated goals?

There are many strategies you can incorporate into your institute design, including lectures by scholars and local historians, panel discussions, walking and driving tours, visits to historic sites and museums, brainstorming sessions, and sessions led by master teachers. The more varied the strategies, the better. The most successful institutes are an intense blending of quality content instruction and interactive experiences which aide teachers in ultimately applying that which they learned to their classroom instruction.

The most critical thing to keep in mind is the balance required between content and classroom application. Elementary teachers in particular can find the content overwhelming and unusable if there is no discussion on how they can apply what they have learned. Institute staff do not have to provide the methods instruction personally, but it is crucial to provide resources and presentations designed to help participants think of ways to actively interpret the content. Highlighting local resources such as historic sites and museums, including the services and programming they provide, is one way to address this balance. However, nothing addresses application like bringing in master teachers to talk about how they teach the content creatively in their classroom.

3. Is there a specific need for the institute program?

Many funding agencies require applicants to substantiate the need for a proposed program, but even when not required, researching this answer can make any design stronger. From the education vantage point, it is important to understand the needs of the teachers and school systems served. The best way to find out their needs is to ask. Your teacher advisors are a great resource, as are local administrators (directors of schools and curriculum or instructional supervisors especially). Need could be brought on by national trends such as the *No Child Left Behind (NCLB)* initiative of the Bush administration which requires, among other things, that teachers become "highly-qualified" in the subject matter they teach. States interpret "highly-qualified" in various ways; however, *NCLB* has created a common need for professional development providing content instruction in curriculum areas including social studies. Need can also be defined in economic, geographic, and ethnic terms for some grants which "invite" applications providing services for eligible districts (i.e. many DOE grant programs). Recent ETHS institutes have responded to a need brought on by a new Tennessee social studies curriculum adopted in 2001. In the new curriculum, fourth grade teachers are responsible for teaching American history through the year 1861 and fifth grade teachers are required to cover 1850 to the present; these teachers have never before been responsible for this material, and many have no background knowledge. Institutes designed since 2001 have considered these curriculum changes and the resulting content needs of these teachers.

From the vantage point of the historical organization, needs should also be identified. IMLS and other granting agencies require proposals to detail organizational needs in the areas of expanding their outreach into the community and for building relationships with new audiences.

4. What is the topic or theme of the institute?

The first step to take when answering this question, if not done before, is to become familiar with your state's social studies curriculum. The social studies curriculum specialist in the state department of education is the best contact person for information, and many state Web sites have the curriculum posted online. If a national audience is targeted, make sure you correlate the institute to a national curriculum framework such as the National Standards for United States History found at www.sscnet.ucla.edu/nchs/standards/. After becoming familiar with the curriculum, you should next consider the resources to which your organization has ready access, such as scholars, local historians, historic sites, museums, libraries, etc. Where the curriculum and your resources meet are good places to focus. Come up with a short list of correlated topics and themes and evaluate them with the help of your teacher advisors; trust their opinion on which ones would be of most interest and relevance to their peers. Also listen for topics and themes that you might have overlooked. If this institute experience is successful, you will find yourself going back to the short list for ideas for future programs.

Lucinda Oakley Ogle talking with teachers in her home about her ninety-two years of life experience in the Gatlinburg, Tennessee area, before and after the Great Smoky Mountains National Park was established.

ETHS has found that the broader the theme or topic of the institute, the wider the audience of prospective teachers. Institutes narrowly focused on time periods or events limit the number of eligible teachers. Different subjects within the social studies are emphasized at different grade levels. For example, American history is surveyed at specific grade levels (in Tennessee the grades are fourth, fifth, eighth, and eleventh only). Therefore, the more relative you can make an institute to all the subjects or strands within the curriculum (i.e. culture, economics, geography) the larger the target audience.

5. What teacher group is the target audience?

Once you determine the topic or theme of the institute, the eligible grade levels are determined by your state's curriculum. The curriculum should always be the benchmark as you want the participating teachers to apply what they learn in the classroom.

An additional aspect to consider is whether you will allow non-social studies teachers to participate. English teachers and media specialists (librarians) are often interested in social studies institutes. Another group to consider is administrators who can share what is learned with the teachers in their schools. Principals in particular can be great advocates and assets. ETHS institute participation is limited to social studies teachers, however we often design specific sessions within the institute for additional teachers and administrators.

6. When is the best time for your institute?

You need to decide on the best time of the summer to offer your institute (the second week of June through the third week of July is the safest window). You will also need to determine the length of the institute. In general, institutes for a state or local pool of teachers should be no more than five to six days (running Sunday or Monday through Friday). There are teachers who build their summer calendar based on professional development, but the number of these teachers at the state and local level will be limited, thus making recruitment challenging. If you are planning for a national audience, however, there would be a wider pool of teachers willing to commit two to four weeks of their time to a relevant, substantial topic or theme.

7. What kind of credit will you offer?

At minimum you should provide a written certificate of completion for each participant which they can use to document their professional development hours. Consult with your state department of education or local school districts to find out about how your institute can translate into re-certification points, in-service hours, etc., for teachers.

Undergraduate or graduate credit is often seen as a positive element in grant proposals, but you should make sure there is a need or demand among your target audience for these credits before incorporating them in your design. Not only do the credit hours make up a large part of the budget, but there is more required of the teachers (lengthier essays, multiple units, oral presentations, etc.). To offer university or college credit, historical organizations not affiliated with institutions of higher learning will need to build a partnership.

8. Who will you partner with to conduct the institute?

As stated above, in order to offer undergraduate or graduate credit, unaffiliated historical organizations will need to partner with an appropriate department within an institute of higher learning. Be aware that this partnership will not only secure the infrastructure needed be able to offer the credits, but it will also bring an additional level of bureaucracy to the project.

Once you decide on your topic or theme, you will need to begin identifying scholars and local historians you would like to partner with, as well as identifying other relevant resources such as historical sites, museums, libraries, parks, community members, master teachers, etc., that will fill out your faculty and itinerary for the institute. Prioritize your list, extend invitations, check calendars, and gather supporting information from each entity or person (résume, letter of support, etc.). Some grants have required forms for you to complete for each individual.

9. How many teachers should participate?

The recommended number of teachers is fifteen to twenty-five.

10. What will you require of participants?

Teachers should be required to produce something as a result of the institute (if not due until after the institute—insure the deadline is within three to four weeks). Think about your goals for the project, and consider how the participating teachers can: 1) illustrate the accomplishment of the goals, and 2) interpret what was learned during the institute for the use of other teachers. Some examples of required products would be lesson or unit plans, essays, or training modules that can be used to share an aspect of the institute with additional teachers in an in-service or workshop environment. The legacy of the institute rests in whatever you require the teachers to produce.

If you offer undergraduate or graduate credit, you will need to negotiate that required element with the partner institution. This is not always an easy task, as

Hints for Itinerary Development

- **It is critical to** involve teacher advisors in this process.
- **There is no such thing** as too much detail when it comes to itineraries.
- **Anticipate everything.** For example, remember that participants come with stuff (luggage, resources you provide, etc.). When appropriate (arrival, departure, travel in-between) you need to allow for the drop off and pick up of these items and provide instruction for the participants accordingly“ the itinerary is a great place to include this.
- **Make sure the first thing** you do with the group is an orientation session of at least one to two hours (at your place preferably“ especially since you will have lots of stuff to distribute and will want to be close to your office for last minute details). Introductions of staff and participants are crucial at this time. You will also cover all the logistical and evaluation details, as well as detailing clearly what will be required of the participants during the institute and after (if applicable).
- **Allow for at least** one and a half hours for meals.
- **If you plan an evening session** after dinner, make sure there is an afternoon break allowing enough time for rest and renewal.

Providing sufficient transportation is one of the key elements in developing a successful program.

- **Research and plan travel time** thoroughly, with rest stops included. The more use you can get of travel time the better (incorporate related films, music, etc., if possible).
- **Start out with a wide variety** of strategies, but keep time in mind“ you might have to prioritize as you refine your itinerary.
- **Always insure the balance** between content and application.
- **Use charter buses for travel.** Do not plan on driving vans. Again, most grants accept this expense. ETHS staff has found that using vans creates small clichés of people and staff is driving so they do not have an opportunity to sit with different participants and get to know them. There can be a good bit of travel during the institute, so make the most of it.

Site visits provide opportunities for teachers to learn history "hands on."

academicians do not work within the same instructional vocabulary (lesson plans, units, etc.) as K-12 teachers, so it is critical that everyone work off the same page from the beginning.

11. Will the institute be residential?

ETHS staff strongly recommends that you consider requiring teachers to stay in residence during the institute. Hotel lodging and meals should be provided through the project budget (most grant programs approve of these expenses). While requiring teachers to stay with the group makes it difficult for some teachers to participate (academic year mini-institutes or workshops are a great option for these teachers), the pros far outweigh the cons. Teachers who commit to staying overnight during the week: 1) consciously dedicate themselves and their time to the institute, 2) develop strong bonds as a class or community of learners, and 3) are able to concentrate and experience the week without distractions and interruptions. Logistically, residential institutes move more smoothly, are easier to keep on track, and are more readily adapted to unforeseen changes. The esprit de corps which grows from the residential experience makes the extra effort on all parts well worth it. If you do decide to require the teachers to stay with the group, make it clear that this commitment is required in your publicity and on all registration or application materials.

12. What resources will you provide?

Consult with institute partners on books, curriculum resources, etc., that they would recommend for the teachers. Prioritize this list and include copies for each teacher in the budget. You may want to send books and/or articles to participating teachers ahead of time, anticipating that this material will be read in preparation for the institute. Again, it is important to keep the balance of content and application in mind. You will want to consider providing academic works as well as curriculum resources (media, maps, teacher guides, etc.).

Don't forget the everyday needs during the institute as well. Be prepared to provide notebooks, journals, pens, pencils, tote bags, and other classroom-type supplies as required.

13. How will you promote and recruit for the institute?

Recruitment is the biggest challenge for summer institutes, particularly when they are residential. You must get the word out in a timely and exciting way, otherwise you will have difficulty filling your slots. As with any programming, you will want to provide press releases to all media outlets (television, newspaper, and radio). Posting information on your organization's Web site is also imperative. The next level of publicity involves distributing brochures and flyers directly through school administrators, principals, and teachers whose names you have accumulated. Distributing digital and hard-copy promotional materials to these individuals is crucial, as well as to teacher media centers and school district newsletters. Professional organizations such as the National Council for the Social Studies and its state affiliates, as well as state and local teacher unions, have meetings where you can present information on your institute as well as newsletters for publication. This is another question that your teacher advisors can be instrumental in helping you answer—after all, word-of-mouth is the strongest form of publicity and recruitment. Full involvement of teacher advisors will pay off when it comes to getting the word out!

14. What logistical arrangements are required?

The best way to answer this question is to prepare an itinerary which reflects the design of the institute as detailed by your answers to the key questions. Give a date and time for everything including sessions, travel, meals, breaks, check-in, and check-out. You will find the logistical needs fall in place. Once the itinerary is detailed, use it as a worksheet for implementation (adding notes, contact information, etc.). This document will prove to be your most critical reference during the project.

15. What methods of evaluation will you use?

Evaluation plans based on qualitative and quantitative data are required for grant funding in the twenty first century. No longer will generic surveys suffice. Start with your goals in mind and think of ways you can document your success in meeting them. This plan can incorporate a combination of tools such as pre- and post tests, written surveys, journals, interviews, classroom observations, portfolio submissions, etc. Depending on the funding source you are applying to, you may or may not be required to contract with an outside evaluator. As a rule, DOE grants require outside evaluation which usually involves contracting with a firm or organization which provides professional evaluation services. For many humanities-based funding sources such as the IMLS and NEH, you can develop your own evaluation plan. (See the IMLS Web site at the close of this article for information on outcome-based evaluation.)

16. What funds are required?

The answers to the preceding questions provide the meat for your budget answers. All you need to do is go to each question and tally the costs that are involved with the answers (anticipate even the smallest and most miscellaneous expenses). The general budget categories to consider are personnel, fringe benefits, travel, equipment, supplies, and "other" expenses. Consult your grant materials to see if there are specific forms which can guide your budget development. You will also want to check the budget guidelines for detailed explanations of which expenses are allowed, as well as to determine if there is a percentage required of in-kind contributions (cash or donation). Federal grants will also require you to designate indirect costs which are defined within the particular grant's guidelines. As a rule, try to cover most if not all of the institute expenses through grant funds and your organization's match. Some grants will actually require that there be no cost to the participants.

17. Does this program meet the mission and unique strengths of your institution?

Now that the informed and inspired concept has made it to a detailed design, the final touchstone is to gauge the result against your organization's mission and strengths. If the answer to this question is yes, then you are ready to formalize your design into a grant proposal.

What's Next?

If your funding proposal is denied, DO NOT GIVE UP! Take the suggestions made by your agency contact or by the readers of your proposal and try again. Many successful grant projects are denied the first time around.

If your proposal is approved, CONGRATULATIONS! Notify your project partners of the good news and begin implementing your design. You can handle things from here, but perhaps ETHS can share a few helpful hints.

Practical Implementation Tools and Suggestions:

- Immediately develop a working calendar (monthly style) with key dates corresponding to each element of your design (you can go back to the key question structure as a worksheet if it helps). Make this one of the first things you do.
- Prepare a binder that will become the project working file during the implementation phase. The first page you come to should be the itinerary with contact numbers for every person and place included (insert the itinerary in a sheet protector). Following the itinerary should be five sections separated by pocket dividers for: 1) the grant proposal narrative, 2) budget forms and receipts—get a receipt for every expense, 3) contact list of project faculty and contracts (if required), 4) signed contracts, emergency forms, and contact list of institute participants, and 5) miscellaneous materials. This binder becomes the project brain and being portable it will actually be with you at all times during the institute.
- Make all reservations and get on all partners' calendars immediately (when locating hotels and restaurants, get recommendations from locals).
- Make sure you communicate with all partners and vendors (transportation, hotels, etc.) on details in writing and/or by phone more than once.
- Make sure all speakers' travel and lecture needs (audio-visual, lecterns, water, etc.) are taken care of.
- Begin publicizing the institute at least three months before it is scheduled to take place. Make sure the registration or application information (including deadline) and your contact information is clearly stated.
- Prepare letters of acceptance within two days of participant selection (keep a list of at least two alternates and notify them of their status). In the acceptance letter you may want to include a brief contract outlining what commitments are required (i.e., the end product you have determined, staying with the group during the week, attendance at any follow up sessions) and an emergency contact form—both of which should be completed, signed, and returned to you within twelve days via mail or fax to confirm attendance. If you don't get a reply, you will need to follow up to determine if their slot should be filled by an alternate.
- A second mailing should go out to confirmed participants as soon as you receive their reply. This mailing should include: 1) any reading required (you may want to allow more time between application deadline and institut e if there is a large

amount), 2) a copy of the itinerary with relevant contact numbers included for family (include a staff cell phone number as well), 3) a list of things to bring, and 4) a contact list of teacher participants (some come from the same community which allows for car-pooling). Also include any logistical information such as directions, parking passes, maps, etc., that teachers will need to get to the starting point. Never assume anything. Anticipate any issue or question that might come up with the teachers and address it appropriately. Put yourself in there shoes—imagine what you would want to know.

- Anticipate every possible occurrence and plan for it. You will then be clear-headed enough to handle the things you would never imagine happening.
- It is a good idea to purchase bottled water and snacks to have on the bus for road trips. Everyone appreciates the thought. The little touches make a difference.
- For expenses you will have to pay during the institute, make sure you have signed checks in the binder or a credit card. Try to arrange invoicing, but often meals, lodging, etc., will require payment.
- Set up for orientation the night before. Have a space at the table for every person with materials and name badges in place. Gather everything you will need for the week in a box or large bag and have ready as well. You do not want to worry about anything other than setting out refreshments on the first day.

Do's and Don't's During the Institute:

- Do leave a copy of the itinerary and emergency contact forms with a key staff person in the office.
- Do moderate during the institute to insure balance between content and application.
- Do stay with the group as much as possible—remember they are sacrificing family time too.
- Do provide time during the week to discuss and brainstorm the required end product.
- Don't forget introductions during the first session.
- Don't loose track of the project binder.
- Don't forget the tax exempt forms.

GOOD LUCK!

SELECTED TEACHER INSTITUTE WEB SITES:

The Gilder Lehrman Institute of American History
www.gilderlehrman.org

Teaching American History project Web Sites
www.teachingamericanhistory.org/tahgrants/

East Tennessee Historical Society
www.east-tennessee-history.org
www.teachamericanhistory.org

Colonial Williamsburg
www.colonialwilliamsburg.org/history/teaching/tchsti.cfm

Stratford Hall and Monticello
www.stratfordhall.org/index.html?EDUCATION
www.monticello.org/education/stratford.html

FUNDING AGENCIES:

U.S. Department of Education
Teaching American History Grant Program
www.ed.gov/programs/teachinghistory/index.html

National Endowment for the Humanities
800-NEH-1121
www.neh.gov
info@neh.gov

Institute of Museum and Library Services
202-606-8536
www.imls.gov
imlsinfo@imls.gov

State Humanities Councils
www.neh.fed.us/whoweare/statecouncils.html

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