

Greater Than the Sum of Our Parts



Villa Finale staff and volunteers participating in the King William Association Fair Parade.

BY ERIN CARLSON MAST

Editor's Note: This is the theme article for the 2014 AASLH Annual Meeting. The Program and Host Chairs and AASLH staff put a significant amount of time into drafting the theme to make it resonate widely across the field. Because we know not everyone can make it to the meeting each year, each spring beginning in 2008 we have included an article in *History News* about our upcoming annual meeting theme. To learn more about the 2014 meeting and theme, please go to <http://about.aaslh.org/conference/>.

You know the story. A poor and hungry stranger comes to a town and goes door to door asking for something to eat. Each household tells him they do not have enough food to spare. The stranger fills a large pot with water from a stream—or maybe it was a spring—and drops in a stone. Curiosity gets the better of the townsfolk and one by one they ask the stranger what he's making, to which he replies, "Stone soup." He muses aloud about what would make the soup better, and the townsfolk individually realize that they have something useful they can spare after all. The townsfolk moved past their mindset of scarcity and found meaningful ways to contribute. Added together, the ingredients yielded a veritable feast, enough for everyone to enjoy. But they created much more than a meal, they created food for the soul, the establishment of community.



Greg Billman

Since 2003, people of all ages have enjoyed the annual production of Brucemore Outdoor Children's Theatre, a premier family event in Eastern Iowa. Characters from the show often seek help from the audience, creating an evening of hilarious and interactive fun.

and sizes, with and without endowments, from cities and towns of all stripes. There is a persistent myth that National Trust sites are centrally funded—they are not. They have different operational and governance structures. And they represent a range of physical, human, and financial resources. Please also note that while these examples are compatible with operating a historic site, they do not depend on it.

I have been privy to many conversations at the National Trust that dealt with scarcity in the field generally and at our

A new study could help explain the benefit of taking a step back and evaluating partnerships and collaborations that can alleviate resource concerns, rather than concentrating on the lack of resources you have to spare or contribute. In *Scarcity*, Eldar Shafir, a psychologist at Princeton University, and Sendhil Mullainathan, an economist at Harvard University, demonstrated that when we are constantly made aware that we have less time or resources than we need, it has a measurable, negative impact on our ability to solve problems. As NPR put succinctly in their review of the study, the impact of being reminded about resource issues causes people's performance on IQ tests to drop by "at least a quarter—or approximately the same mental hit a person takes after staying up all night." Thoughtful, strategic collaboration can help augment resources, freeing mental bandwidth to solve problems effectively.¹

Of course, collaboration does not always yield a greater sum. To take the stone soup metaphor further, what elements of a collaboration support tasty soup, great conversation, and bonds that hold long enough to push the equation from equal to greater than? To find out, I turned to my colleagues at National Trust sites for examples of how they have pushed their work to the next level through collaborations. It was a welcome opportunity to learn more about the work of colleagues I seldom see. I selected the examples that follow from the many ideas they shared plus a President Lincoln's Cottage experience that helped inspire the 2014 AASLH Annual Conference theme.

I then contemplated what questions might help you find similar success. Before you dismiss the following examples as not applicable to your situation, forget what you think you know about National Trust sites. They come in all shapes

sites specifically: lack of time, lack of staff, and lack of financial resources to address all the demands before us. Despite all that, passion for the work was always in abundance. Although that tension occasionally led to some hand-wringing, it has led to hard questions, trial and error, determination, and great successes.

As you read through these examples and questions, try to imagine your own organization, or institutions you've been affiliated with, and your own successes and challenges with forming alliances that become "Greater Than the Sum of Our Parts."

CULTURE CHANGE—DRAYTON HALL

George McDaniel, Executive Director of Drayton Hall in Charleston, South Carolina, is no stranger to grassroots advocacy efforts. Along with members of its community, Drayton Hall fought a mega-development that would have jeopardized its historic environs, replacing scenic drives with gridlock. In McDaniel's words, "Drayton Hall's past has been shaped by the fate of the Ashley River region, and so will our future. What happens 'upstream' affects us."

McDaniel was among the citizens who supported the designation of the Ashley River as a State Scenic River. Several years later, when the county contradicted a river management plan by refusing to buy land adjacent to the Ashley River to create a park, McDaniel and other members of the Ashley Scenic River Advisory Council went together to testify before the county council about the importance of purchasing the property. When they were told it was too late, they began a grassroots campaign. At the next county council meeting, 200 people packed the council rooms. Through

the Advisory Council's combined efforts and the help of local council members, the Rosebrock Park (named after one of the councilmen) was purchased and created. In addition, further land diagonally across the river became the Ashley River Park.

By seeking out fellow, committed stakeholders, identifying and cultivating political allies, and using those combined networks to rally support, they succeeded in their conservation effort. That alone would have made the collaboration a success. But because of the inclusive nature of their work, they achieved something greater—culture change. According to McDaniel, the result of the successful campaign is that a preservation ethos now exists “in Dorchester County, which used to be hostile to historic preservation and environmental conservation.” For Drayton Hall and its partners, creating culture change started with a structured advocacy effort.

Lesson Learned: A classic, “If you want to go far, go together.”

Questions to consider:

- What are you doing to advocate on behalf of your institution or the field at the local, state, or national level?
- Are local, state, and national decision makers familiar with your organization and its impact? If not, how can you raise your organization's profile among these groups?
- What type of advocacy work are you engaged in? Is it consistent with your mission?
- If you are preparing to start an advocacy effort, how will you unite committed stakeholders on a specific issue?

NEIGHBORHOOD PRIDE—VILLA FINALE

Villa Finale is located in the heart of the King William Historic District of San Antonio, Texas. The Historic District predates the site's public opening, but is closely connected to it. Walter Mathis, the last private owner of Villa Finale, was a driving force in local preservation. Villa Finale is continuing in Mathis's footsteps. According to Executive Director Jane Lewis, the site is very involved with the King William Association, a neighborhood group. Lewis notes, “Each year when the King William Fair—a giant street fair that covers the entire district—is held, Villa Finale is the VIP retreat for board members and top sponsors of the King William Association. Villa Finale members are also invited to enjoy the grounds of the museum during the fair.”

By identifying that what they bring to the table is unique, and positioning themselves as an asset to the lead organization, Villa Finale has established itself as a place of neighborhood pride and authority. Says Lewis, “This event is the largest annual fundraiser for the King William Association.” There is a measurable, direct benefit to Villa Finale as well. The retreat-like atmosphere and behind-the-scenes exposure as the VIP retreat results in new members each year.

A leader in their neighborhood, Villa Finale also plays an active role in fostering state pride through preserva-

Villa Finale

Members' entrance to Villa Finale for retreat during the King William Association Fair.



tion advocacy. They participated in the “I Love Texas Courthouses” campaign, a joint effort of Preservation Texas and the National Trust for Historic Preservation, and participate annually in Preservation Day lobbying activities in the state. “It expands our reach and engages us in more outreach programs within the state,” says Lewis. “By expanding our presence through these other organizations, we become more visible within the community.” For Villa Finale and its partners, neighborhood and state pride are a proven formula for community and donor support.

Lesson Learned: What happens behind the scenes is as important as what happens out front; make the most of your role, whatever that may be.

Questions to consider:

- What resources are you willing to put toward a collaborative event or campaign?
- How is your organization uniquely situated to provide that added value?
- Do the tangible and intangible benefits of the event justify the investment?

ENLIGHTENMENT—MONTPELIER

For organizations in culture-saturated areas, partnership is both necessity and opportunity. According to Doug Smith, the Director of the Robert H. Smith Center for the Constitution at James Madison's Montpelier located in Orange County, Virginia, “The sheer number of historic sites near Montpelier and related to the founding of the United States provides a unique opportunity where unified programming can create value for all partners.” Sites in the region have made a concerted effort to complement—rather than compete with— one another's programming. Smith notes, “Montpelier, through its Robert H. Smith Center for the Constitution, is a leading partner in the Presidential Precinct, a consortium uniting five landmark institutions.”

The institutions include three major presidential sites: Thomas Jefferson's Monticello, James Monroe's Ash Lawn-Highland, and Montpelier, as well as two major universities with direct connections to the history of the sites: the College of William and Mary, where Jefferson and Monroe studied the intellectual underpinnings of the American experience in self governance, and the University of Virginia, which Jefferson founded, with assistance from Madison and Monroe.

Smith explained, "The Presidential Precinct creates an environment that fosters inspiration and enlightenment, and provides a singular destination for international dialogue, critical thinking, and collaborative problem solving" in the heart of Virginia. "The goal of the Precinct is to advance the development of democracy around the globe. As a consortium, our institutions are able to leverage the strengths of each site." The sites have capitalized on the fact that they offer a concentrated store of knowledge about "three of the most formative leaders in American history and the principles of self-governance that they espoused." The power of the Presidential Precinct's concentrated, collaborative effort caught the notice of the White House. Smith noted that they, "recently secured a financial commitment from the White House's Young African Leaders Initiative to train 225 leaders at sites in the Precinct over the next five years. One of the greatest legacies of sites like Montpelier is that we can continue to share the stories of our own founding period with domestic and international leaders actively forming constitutional democracies and building civil societies. The State Department and White House see tremendous value in our collaboration." For Montpelier and the other members of the Presidential Precinct, the power to inspire and enlighten today's leaders stems from their credibility as places that inspired enlightenment in past leaders.

Lesson Learned: The history of your organization may contain clues for meaningful collaborations with regional, national, or even global impact.

Questions to consider:

- If your region is saturated with like-organizations, how can you position your organization as a distinct and desirable partner?
- If there is a dearth of like-organizations in your area, how might you connect to organizations with compatible missions or themes in other parts of the country or world?
- What is preventing you from partnering with certain competitors who have compatible missions or themes?
- Do you avoid partnering with larger organizations for fear of being steamrolled, or conversely, smaller organizations because you assume they have little to offer?

COMMUNITY VOLUNTEERISM—FILOLI

The centerpiece of Filoli in Woodside, California, is a 1915 mansion, but their assets extend well beyond that one building. Executive Director Cynthia D'Agosta emphasizes that "Filoli's assets include many 'parts' that we consider

Greg Billman



More than 10,000 people annually attend the Freedom Festival Balloon Glow on the Brucemore estate.

and market as the whole, including the mansion and auxiliary buildings, the sixteen acres of historic formal gardens, over 200 varieties of heritage orchard trees, more than 660 acres of nature preserve, as well as the café and gift shop." It takes a considerable amount of human resources for Filoli to thrive. According to D'Agosta, "We have 58 staff and 1,000 volunteers who work together extremely well to make this place great."

Filoli has managed to engage a highly diverse and skilled network of volunteers who in turn support the site in a variety of ways. Local environmental education nonprofits provide input on Filoli's Nature Hikes, school visits, and educational curriculum. The institution has engaged MBA students from California College of the Arts to assess and



make recommendations on Filoli's development strategies and ability to meet the demands of a new demographic in the area. Pro-bono food service specialists advise on improvements to the café, catering, and hosting operations. And a local television station covers Filoli's biggest annual events, increasing visitation and exposure for the site while helping the station fulfill its community service needs. D'Agosta concluded, "Our entire volunteer community is a network we could not operate without and we nurture that relationship on many levels!" Taken separately, each volunteer or pro-bono project has a specific purpose and benefit. Taken as a whole, Filoli's massive, coordinated network of staff, volunteers, and pro-bono partners result in an organization that is able to maintain infrastructure, vitality, and relevance to its community.

Lesson Learned: When it comes to volunteers and partnerships, you can only expect to get out what you put into it.

Questions to consider:

- How are the physical assets at your organization marketed, supported, and utilized?
- If you have a volunteer program, how functional is it?
- How diverse are the opportunities for volunteering? Are you maximizing the skillset of your volunteers, or are their skills being squandered?
- If your volunteer program is nonexistent, what is holding you back?

CULTURAL CAPITAL—BRUCEMORE

If you visit Cedar Rapids, Iowa, and ask the locals what you should do while you are in town, there is a good chance the response will be, "Go to Brucemore." For more than three decades, Brucemore has pursued a strategy that promotes the site as an authentic setting for "unique cultural experiences" in their region—experiences that draw approximately 40,000 people each year in a city of 200,000, according to Executive Director David Janssen. He explained, "Brucemore's broad and diverse menu of events has included almost every genre imaginable, from blues and rock-and-roll, to jazz and symphony, to the Joffrey Ballet

(twice). Brucemore also produces annual theater events on a natural slope near the estate's duck pond. Additionally, the site has hosted garden and art shows, Scottish heritage festivals, and old house fairs. In 2013 alone, the estate hosted or produced thirty-seven performances as part of thirteen distinct programs."

Janssen shared, "The secret—and the challenge—is that none of these is a simple turnkey event. Each has unique challenges, cost centers, and audience appeal, requiring months and years of planning, trial, and error before they flourish. What they all have in common is a complex interplay among multiple stakeholders, including: cultural partners, food and service vendors (who often acquiesce with discounted rates), volunteers, sponsors, city leaders, and contractors. Each program relies heavily on collaborators motivated to supplement the capacity of site staff. None of the events would be possible to host or produce relying only on in-house resources."

Being a beloved cultural center in the region with a reputation for collaboration can make it difficult to say no or to sunset once-popular programs. After years of adding programs, Brucemore recently made the difficult decision to end a signature program known as "Bluesmore." While the decision to end the program and its associated partnerships wasn't easy, it was the right move to maintain the quality and integrity of programs with deeper support and broader interest. Brucemore's strategy has the annual impact of showcasing an attractive slate of differentiated events with a variety of partners, and the lasting impact of a regional reputation as the go-to place and partner for diverse cultural experiences.

Lesson Learned: Take the long view. Being a cultural pioneer with stick-to-it-iveness can result in true sustainability, as long as you are willing to make tough decisions.

Questions to consider:

- If a tourist asked a local in your area what attractions they should visit, what would be their first response? If you don't have public visitation, are you visible in other ways?
- How much time are you willing to give a collaboration to develop before you determine whether it's a success or failure?
- What is your exit strategy for a collaboration that has run its course?
- How can you create a culture of collaboration within your organization? Within your community?

BUILDING A FOUNDATION—PRESIDENT LINCOLN'S COTTAGE

The inspiration for the 2014 AASLH Annual Conference theme was its location and a past AASLH conference session. Minneapolis and St. Paul, the "Twin Cities," developed to meet different needs. St. Paul grew as the state capital and the port at the head of navigation on the Mississippi, while Minneapolis developed around the industrially powerful and majestic Falls of St. Anthony. Minneapolis and St. Paul complement one another just as so many historical organizations across the country do today. Their historic partnership—and occasional good-natured ribbing—serves as a vibrant example of how strategic networks of complementary efforts benefit everyone.



Bruce Monroe School

A third grade class from the Bruce Monroe School, located blocks from President Lincoln's Cottage, made their own top hats on a visit to the Cottage.

The idea behind the theme also grew out of a lively panel developed first for the AASLH 2010 conference in Oklahoma City by the members of the Civil War Washington Museum Consortium: President Lincoln's Cottage, Ford's Theatre Society, Tudor Place Historic House and Garden, and Frederick Douglass National Historic Site. The consortium members realized they were better together as a one-stop shop for teachers' Civil War Washington needs. As Callie Hawkins, Associate Director for Programs at President Lincoln's Cottage, recollected, "The consortium group had worked with several Teaching American History grants to create weeklong field experiences for national groups of teachers using our own model for the Civil War Washington Teacher Fellows. We were surprised when each of these groups remarked on how unique it was that four distinctive, yet alike, organizations worked so well together to provide a seamless week of learning experiences for their teachers." It is noteworthy that the teachers found the functionality and productivity of the cultural partnership so novel. According to Hawkins, prior to committing to the partnership, the consortium members took a hard look at their resources, compatibility, and the program's objectives and needs. What they discovered was that when it came to needs such as physical space, expertise, staff resources, or budget, they each had an area of scarcity and abundance. They each contributed something unique. In short, they were near-perfect complements for the purposes of the teacher fellows program partnership. After comparing content and methodology, they discovered that not only were they able to offer a well-rounded perspective on the Civil War together, but each site used different methods for engaging teachers, which ensured instructional variety. The group then agreed on the parameters of the partnership itself. Not only has the partnership endured and evolved, it has created a foundation of trust for additional collaboration.

Hawkins reported that when the consortium presented on their process and outcomes to the AASLH membership

in 2010 and again through a different panel in 2011, the responses were mixed. But in both cases, session attendees focused on the fact that the consortium members were fortunate that they had compatible personalities, expressing concern that if any of them left, the partnership would likely fall apart. The members of the consortium did not deny that individual personalities are a major factor in the success of any collaboration, but noted that since each of them was able to demonstrate the value of the collaboration with competitors, the organizations had come to regard the partnership as indispensable. For President Lincoln's Cottage and the Civil War Washington Consortium, leading with friendship and an open mind paved the way for a collaborative

peer network and invaluable partnerships that enhance resources and transcend individual personalities.

Lesson Learned: Partnerships will be more enjoyable, if not more successful and enduring, if you are honest about what you have to offer and what you have to gain, and if you check your ego at the door.

Questions to consider:

- Is a potentially powerful partnership being sidelined due to personality conflict? What role do you play in the success or failure of that potential partnership?
- Are you realistic about what your organization has to offer?
- How will you determine who to have around the table?

Looking across the range of National Trust sites, there are many more examples of collaborations, from joint-ticketing ventures, to staff exchanges, to partnerships with universities, nonprofits, and businesses that vary widely place to place, year to year. Partnerships and collaborations form the basis of our work. Not every partnership is desirable or destined to succeed, but each will contain valuable lessons and potential templates for future collaborations. While there is no formula that will ensure successful, transcendent partnerships every time, many of my colleagues were quick to offer words of caution, lessons they have learned and tested along the way. Partnerships need to be well structured. Diplomacy and honesty go a long way. Responsibilities and decisions need to be carefully articulated and agreement documented. And it never hurts to have a Plan B. ●

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¹ Michaelleen Doucleff, "How Money Worries Can Scramble Your Thinking," <http://on.aaslh.org/ScarcityandThinking>, 29 August 2013.