

ENTREPRENEURSHIP *in Historical Organizations*

BY JOHN W. DUREL

Editor's Note: The 2009 Annual Meeting, Making History a 21st-Century Enterprise, will explore entrepreneurship within our field—marrying fresh concepts with our mission as stewards of the past. Cultural entrepreneurship does not end with the fiscal bottom line. It inspires meaningful interaction among stakeholders; it connects personal history to the history of our nation and world; and it promotes positive social change. Join us as we engage in this discussion at a critical time for the field.

It seems almost preposterous to describe historical and cultural institutions as entrepreneurial.

The popular view of an entrepreneur in America can be seen any month on the cover of *Inc.*, young, smart, ambitious, hard driving, probably living in California, with a bright idea or new product that will make millions. These are not the kind of people one usually finds working in archives or at historic sites.

Equally absurd, it would seem, is a discussion of entrepreneurial museums at a time when our country is experiencing the worst economy since the Great Depression. Isn't it entrepreneurship, with its unbridled risk taking and greed, that got us into this mess? Don't we need to get back to basics, avoid new and unproven programs, and stick to what we know?

These popular but flawed views belie the true nature of entrepreneurship, which has nothing to do with greed or even getting rich. The term signifies an approach to work that can be applied to any endeavor, including achievement of a nonprofit's mission. Indeed, an entrepreneurial approach may be critical to success, especially in a time of rapid cultural, technological, and economic change.

What is Entrepreneurship?

Entrepreneurship is the practice of finding opportunity in change. Entrepreneurs see change as normal and healthy. They routinely analyze how things are changing and shift organizational resources to take advantage of new circumstances. Entrepreneurship is the function that enables an organization to remain effective and relevant as the world around it changes.

If things did not change, doing more of the same, over and over, would maximize the value an organization brings to the public and generate the resources it needs to carry on the work. But, of course, things do change. To cite just a few examples, over the past two decades we have seen changes in the ethnic composition of our communities, the ways in

which people spend leisure time, the technologies used to communicate, and most recently in the amount of money people have to spend. Every organization has to deal with such changes. Entrepreneurial organizations seek ways to exploit them, turning the changes into new opportunities for building capacity and achieving missions.

In general, leaders in successful entrepreneurial organizations follow these practices:

- **Strategic Thinking** – Leaders regularly think about and discuss how the world external to the organization is changing and how those changes may offer new opportunities to deliver the mission and build capacity. They see the big picture and the long view. They find ways to match their organizational strengths and assets to external trends in a way that produces something of value to others.
- **Business Thinking** – Although making money is not the goal, they are mindful of the need to generate financial resources. They select opportunities that promise to generate revenue and become financially sustainable.
- **Discipline** – They make decisions based on research and data (not just a hunch), establish specific goals and targets for each undertaking, and track results.
- **Experimental** – They are willing to try new things to see if they will work, with the discipline to learn from both failures and successes.
- **Letting Go** – They are able to abandon efforts and activities that are not producing results, no matter how “sacred.”
- **Nimble** – They are able to respond quickly to opportunities, not hampered by internal resistance or bureaucratic decision making.

Personal Characteristics of Entrepreneurs

It is a common misperception that entrepreneurs are like gamblers betting on a game of chance. A more apt metaphor would be an adept player competing in a game of skill. They like the uncertainty of a new endeavor and thrive on testing themselves with new challenges. They push themselves into new situations to see if they can make things work. They are constant learners. It is not uncommon to hear an entrepreneur say, “I haven't got this figured out yet, but I will.”

Successful entrepreneurs see themselves as making educat-

ed decisions, informed by their own knowledge and experience, by their observations, and by what they learn through research. They may follow their gut, but it is an educated gut. This requires discipline. To succeed not only must one gather information and analyze data at the front end, one must also keep a close eye on measurable indicators to know whether or not the endeavor is succeeding. With experience, an entrepreneur becomes adept at reading the external environment for opportunities that others do not see.

Entrepreneurs prefer a flexible rather than a highly structured work environment. They gravitate to the big idea and long-term thinking, and may have difficulty with details. They tend to process information quickly and often are ready to make a decision before others are. This can be frustrating both for the entrepreneur who gets impatient and for others in the organization who need more time to sort through the details and get comfortable with the new idea.

Entrepreneurs are risk takers. The most successful take the time to assess the risk and make sure that failure of an endeavor does not jeopardize the entire organization. They know to start small and build on success, and are not afraid to cut loose if things are not going well.

This article features six entrepreneurial leaders of historical and cultural organizations. Each possesses many of the characteristics just described. In addition, they all share a commitment to preservation, education, scholarship, and interpretation of the past. They are not outsiders brought in to introduce business practices to nonprofits. Rather, they are nonprofit leaders who are by nature entrepreneurial.

Building Entrepreneurial Organizations

The St. Augustine Lighthouse and Museum in Florida and the Mid-Atlantic Center for the Arts (MAC) in Cape May,

New Jersey, are prime examples of entrepreneurial cultural organizations. Each is led by an entrepreneur and each earns approximately eighty percent of annual operating revenue through fees, sales, and other earned income activities. Each exists in a seaside city where tourism is the main economic activity.

In Florida, Kathy Fleming has built an organization with a mission to “discover, preserve, present, and keep alive the story of the nation’s oldest port, as symbolized by the working St. Augustine lighthouse.” By maximizing the money generated by the lighthouse, including a very profitable gift shop, her organization has been able to support a marine archaeology program, conservation of artifacts, and educational programs.

Fleming embraces the label of entrepreneur. Her organization maximizes revenue so that it can maximize mission. She has seized opportunities to earn revenue, not for the purpose of making a profit, but to build organizational capacity to achieve the mission. She has built a staff that understands the relationship between mission and profit, one that regularly designs programs and services that accomplish both.

Michael Zuckerman in Cape May considers himself an entrepreneurial manager instead of an entrepreneur.



KATHY FLEMING
St. Augustine Lighthouse

Kathy Fleming



MICHAEL ZUCKERMAN
Mid-Atlantic Center for the Arts

Mid-Atlantic Center for the Arts

One way to foster entrepreneurship is to develop a **3-Month Innovation Cycle** in your organization. Every three months the staff tries something new in order to reach a targeted constituency and achieve organizational objectives. You will need to have an “innovation fund” in your budget, large enough to support the initiatives, but not so large that you risk losing too much money if an initiative fails. In the example below, \$1,000 is used for each initiative.

The innovation cycle has three phases. These three phases should take no more than three months. This is to ensure that you are practicing being nimble and quick.

1. Idea Phase

- \$1,000 to support an innovative initiative (program, product, or service).
- Initiative must be designed to reach a target constituency and achieve an organizational objective.
- Give funds to an individual (who must create a team and pull others into the process to make it happen).
- Engage creative, entrepreneurial people, those comfortable with risks.

- Utilize an unstructured, out-of-the-box generation of ideas.
- Go outside of the organization to get new ideas.
- Bring outsiders in to spark imagination.
- Come up with something that just might work, but might not.
- Be clear about what you hope will happen, what objectives you hope to meet, and what constituency you hope to serve.

2. Testing Phase

- Develop a detailed, structured implementation plan with measurable objectives and benchmarks.
- Get advice from people who are really well-organized and who know how to get things done.
- Ensure that resources are adequate and used efficiently.
- Set a timetable and stick to it.
- Communicate with those affected by the initiative so they know what to expect and can help when needed.
- Include a plan for monitoring progress and evaluating both the output (activities) and the outcome (impact).

3. Learning Phase

- Evaluate the initiative against the hoped-for objectives.
- Use dialogue to get a number of perspectives on what worked well and what did not.
- No blaming; the purpose is to learn.
- Assess not only what happened when the initiative was executed, but also the process used to create the program.
- Come up with ways to do things better next time.

At the end of the Learning Phase you can decide that:

- The project is not worth continuing, and so you begin a new innovation cycle with a new project;
- The project worked fairly well and you want to run it through the cycle again, with improvements;
- The project was very successful and it should become part of your regular services and operations.

In contrast to the business entrepreneurs on his board, who risk their own money on ventures, Zuckerman sees himself as risk averse. He would not put his own resources on the line and is very careful about the organization's funds. Still, he is very comfortable with his board's expectation that earnings account for the vast majority of income.

MAC was barely a year old when the board decided to purchase the franchise for the local tourist trolley. They saw this as an opportunity to make money. Zuckerman saw it as an opportunity to create a museum without walls, effectively turning the entire city into a place to present history. From a single open-air trolley twenty-seven years ago, MAC now operates five enclosed trolleys that take visitors around the city, including to its own historic properties, the Physick Estate (a nineteenth-century historic house), and the Cape May lighthouse. MAC interpreters ride the trolleys, giving visitors an engaging and accurate interpretation of the city's history. In addition to the trolleys and historic properties, MAC generates revenue through a host of arts and community events and retail shops. MAC has grown to be one of the largest employers in Cape May.

In their respective organizations, Fleming and Zuckerman have built financial models that generate earned revenue in order to achieve educational missions. Had they been different types of leaders, the outcomes would have been different. Had Zuckerman been averse to entrepreneurship, he would not have survived in his job, given the nature of his board. Had Fleming been just an entrepreneur without a commitment to preservation and education, the St. Augustine Lighthouse would simply be a tourist attraction. Both leaders understand that entrepreneurship in a cultural organization is a means to a greater end.

Bringing Entrepreneurship to Existing Organizations

An organization need not be new, small, or in a tourist environment to be entrepreneurial. Some leaders in large, traditional historical organizations have taken an entrepreneurial approach to bring about change. They have met resistance and persisted, knowing that there was greater risk in doing nothing.

Norman Burns arrived at Maymont in Richmond, Virginia, intent on making change. After only five months of assessing the situation, he surprised his senior managers with an announcement that everyone was fired. He then went on to say, "If the gates of Maymont were closed today and tomorrow morning a new leadership team walked in, would they run Maymont with all its current assets the same way we do?" To a person,

every manager answered "No," and then they launched a process to "Remake Maymont."

Maymont is a one hundred-acre park open free to the public, funded primarily through government and foundation grants and other fundraising activities. The park includes natural habitats for Virginia wildlife, a nature center,

gardens, and historic house. For years these varied components had been treated as distinct entities, mirrored by silos in the staff where one department had little to do with another. In remaking the organization, Burns has moved to break down the silos and integrate the visitor experience. Some managers have not survived the transformation. Those remaining have shifted from being a management group to a leadership team where members take responsibility for the whole, rather than just their respective parts.

Burns has challenged the team to increase earnings from food concessions, souvenir shops, and facility rentals. Slowly they have learned how to think with a business sense. They have implemented a strategy to increase visitor stay time through better integration and linking of the different experiences. With strategic placement of food concessions and retail shops, they have begun to increase revenue. A breakthrough came recently when two of the leaders (not Burns) came up with an idea to close an unprofitable shop in order to free space for a more profitable facility rental program.

Challenging staff in a bureaucracy can be especially difficult. Bureaucrats are primarily concerned with following policies and rules and are wary of change. The staff usually responds to a new idea with a discussion of why it won't work. If they cannot quash the idea immediately, they will study it for an extended period of time until it fades away. They feel justified in these responses because the way they have always done things is the only correct way. In a deep bureaucracy, people are entrenched in a culture that prevents them from seeing and being comfortable with anything new.

Anita Walker was in such a situation as Director of the Iowa Department of Cultural Affairs, which includes the

State Historical Society. Her direct reports, the bureau chiefs (their titles hint at the nature of the organization) had been with the Society for many years, some more than twenty. In both her personality and ideas for the future she stood in sharp contrast to the others.

Walker understood that the Historical Society had to change. Public participation and appreciation for its

work was low, as was morale. For years budget reductions had resulted in a significantly reduced staff. Those who remained felt they had inadequate resources to do their basic jobs, let alone anything new.

When she received a directive to make yet more cuts, Walker gathered the staff and asked them to look around the room at their colleagues. Another half-dozen of them would lose their jobs unless they did something different. They needed to find ways to earn revenue. Not wanting to face more cuts, the staff went along, some reluctantly, others with enthusiasm. They found ways to provide services for a fee to other historical organizations around the state. They increased rentals of the building for events and functions, including weddings. They boosted programming to attract

Maymont Foundation



NORMAN BURNS
Maymont Foundation

Massachusetts Cultural Council



ANITA WALKER
Massachusetts Cultural Council
(and formerly of the Iowa
Department of Cultural Affairs)

How Entrepreneurial is Your Organization?

This assessment will reveal how entrepreneurial your organization is: the higher the score, the greater the degree of entrepreneurship.

In order to identify areas for improvement, ask staff to complete this questionnaire.

Senior leaders should then analyze the results and determine a course of action to increase the practice of entrepreneurship.

	Strongly Disagree	Disagree	Not Sure	Agree	Strongly Agree	TOTAL
Our work schedules are flexible and somewhat unpredictable, depending on what is needed at a given time.	1	2	3	4	5	
We like to experiment with new programs and new ways of doing things.	1	2	3	4	5	
We have high levels of energy and enthusiasm at work.	1	2	3	4	5	
We regularly talk about what is going on outside of our organization in our community and in the lives of the people we serve.	1	2	3	4	5	
We regularly go out, observe, question, and listen to our stakeholders (members, visitors, donors, community leaders, etc.).	1	2	3	4	5	
Before we implement a new idea we clearly define what we want to achieve and a way to track results.	1	2	3	4	5	
We have an inclusive yet quick decision-making process.	1	2	3	4	5	
We base our decisions on an analysis of data, and we act once we are about 60% sure of the best course of action.	1	2	3	4	5	
We are curious about why some activities work well for us and some do not.	1	2	3	4	5	
We build on our successes by reallocating time and resources away from activities that are not as successful.	1	2	3	4	5	
We do not shy away from talking about our organization as a business.	1	2	3	4	5	
We do not hesitate to stop doing a program or activity that is not (or is no longer) producing the desired results.	1	2	3	4	5	
We are able to respond to opportunities quickly, not hampered by internal resistance or bureaucratic decision making.	1	2	3	4	5	
We reward innovation—whether it succeeds or not.	1	2	3	4	5	
We treat mistakes and failures as opportunities to learn.	1	2	3	4	5	
We manage risks by taking small, incremental steps and tracking results.	1	2	3	4	5	
We have money held in reserve to try new programs and ways of doing things.	1	2	3	4	5	
We are comfortable with ambiguity and uncertainty.	1	2	3	4	5	
We expect things to change and look upon change as an opportunity to better achieve our mission.	1	2	3	4	5	
TOTAL						

more people to the museum and store. This was not a sea change. The Society did not suddenly become an entrepreneurial organization. However, Walker was able to break through resistance and create an opening for staff to initiate innovative programs.

Walker, who now directs the Massachusetts Cultural Council, says, “I think the big learning from my Iowa experience...was to recognize the value the non-entrepreneur brings to the table and harness that in a way that everyone can enjoy success. In other words, there are no enemies here...just people who will get there on a different path and a different pace.”

Challenging Our Assumptions about History Organizations

In bringing change to their organizations, some entrepreneurial leaders have challenged our assumptions about what history organizations do. At the heart of entrepreneurship

is the ability to see an organization from the outside in. In Steven Weil’s words, it requires a shift in perspective from being about something to being for someone. An entrepreneur first seeks to understand the needs, interests, and aspirations of others, and then finds ways to realign the organization so that it better serves the public.

In Pittsburgh, Andy Masich and his leadership team at the Senator John Heinz History Center have embraced popular approaches and uses of history. Rather than first deciding what history should be presented and then attempting to get people to visit, they have observed how people already engage with history and adapted their programs and exhibits accordingly.



ANDY MASICH
Senator John Heinz History Center

Senator John Heinz History Center

It is well-known that in American society more people are interested in sports than in history. Instead of simply accepting this, the History Center folks have found ways to use it to build interest in history. In one innovative approach, they connected Pittsburgh Steelers fans to the Lewis and Clark Expedition through the Rooney family, Pittsburgh natives and long-time owners of the franchise. In 2003, Dan Rooney and members of his extended family retraced the expedition, which began in Pittsburgh two hundred years earlier and ended at the Pacific coast in Oregon. Fans were able to share the adventure on the website for the Steelers, in an exhibit at the museum, and in a publication.

Similarly, while some in our field have decried the TV program *Antiques Road Show* because of its emphasis on the monetary value of historical objects, Masich saw an opportunity. The History Center partnered with a local station to produce *Pittsburgh's Hidden Treasures*. More than 2,000 people showed up at the History Center on a Saturday to have artifacts appraised, which resulted in a series of seven half-hour TV shows that drew 150,000 viewers and the highest Nielson ratings in the region for the time slot. People learned not only the monetary value of an object, but also how it fit into the context of the city's history.

Masich is deeply passionate about history. His entrepreneurial approach blends popular culture with sound historical scholarship. This is evident in the use of radio, television, and the Internet to reach new audiences. In ten years, public awareness has increased from four to eighty percent and attendance and revenue at the History Center have nearly doubled.

Another organization that has contested traditional notions of historical organizations is the Strong National Museum of Play in Rochester, New York. Change occurred there because its leaders were dissatisfied with the number of visitors they served. They could have continued to produce social history exhibits that attracted about 130,000

visitors a year, a respectable number for a history museum. Instead they surveyed the needs and interests of their community, responded with exhibits and programs for children and families, and now serve more than a half million visitors annually.

G. Rollie Adams and his colleagues at the Strong took heat for their actions. Professional colleagues criticized them for abandoning the mission of preserving and interpreting the past. For several years the museum seemed to have two faces,

a children's museum on the first floor and a history museum on the second. It took time to resolve this ambiguous situation, until the leaders articulated a new mission—the cultural importance of play—that integrated the family audience with the greatest strengths of the historical collections: dolls, toys, and games.

As Adams's experience at the Strong reflects, entrepreneurship requires a degree of comfort with ambiguity. Things are not always perfectly clear in advance, but that's

okay. Part of the challenge, and reward, is to put things in motion and see what happens.

Risk and Failure

In the 1990s there were some high-profile entrepreneurial ventures in the history field that failed. That was a time when many thought that a dramatic expansion of facilities and programs would lead to greater visitation and revenue; if you built it, they would come.

I was personally involved in one such case, as deputy director and later as executive director of the Baltimore City Life Museums. We took a big risk in opening a new exhibition facility without having raised sufficient funds for programming and endowment. When visitation did not meet expectations, we began a downward spiral of cuts in staff and programs, which ultimately led to closing the institution.

The Baltimore case is an extreme example of a situation many historical organizations have faced. Decisions to expand programs and facilities have led to increased operating costs with no increase in revenue. Sometimes the organization carries a debt, placing a further drag on operations. In making such decisions, leaders have failed to fully grasp and manage the risk involved. To guard against excessive risk, successful entrepreneurs examine with great care the assumptions behind financial projections. Notably they take small steps to test ideas and track results, rather than putting the entire organization at risk.

Kathy Fleming in St. Augustine explains, "Many [actions] fail. I can't put my finger on all the failures, there are so many. If it doesn't work it isn't a tragedy, we just try something else. Our museum Super Bowl event [the year the game was played in nearby Jacksonville], that was a big one. Products fail daily. So far using eBay has not worked really well for us."

Michael Zuckerman in Cape May describes the failure of a retail shop on the boardwalk in nearby Wildwood, a seaside town that has experienced a renaissance based on its heyday in the 1950s and 60s. For several years MAC offered Doo Wop tours of Wildwood, and opening a themed shop there appeared promising. As it turned out they lost \$100,000 in two years. Zuckerman says it was "painful but not life threatening."

Entrepreneurial organizations learn from success, as well as failure. Exceptional results can lead to more innovation. In a comment made in early 2009 about her organization's response to the economic downturn, Fleming says, "We noticed that specialty tours at a certain price point are doing very well, so we've created mini-task forces of teams of employees to create new specialty tours and offerings."

These comments reveal typical entrepreneurial behavior with regard to risk: look for new opportunities, respond in a timely way, take small steps, track results, build on success, and drop anything that doesn't work before it becomes a major failure.

Ghost Tours

"Over my dead body." This was Zuckerman's response when tour operators approached him in 2000 with a proposal to conduct ghost tours in Cape May. However, by



G. ROLLIE ADAMS
Strong National Museum of Play

2003 MAC was facing falling visitation due to changes in the tourism market, as well as state budget cuts. So they began to offer ghost tours, Halloween programming, and lectures about the history of spiritualism in the nineteenth century. These activities now account for about five percent of revenue.

Similarly, Kathy Fleming's staff initially resisted ghost tours of the St. Augustine Lighthouse, in spite of growing demand spurred by the tower being featured on a popular television program about haunted places. Their response was to offer tours through a for-profit subsidiary that they had set up previously as a merchandising and consulting venture. These profitable "Dark of the Moon" tours are helping the organization weather the current economic recession. The tours focus on the facts of who really lived and died at the historic site, and not just the telling of ghost stories. They also allow time to quietly experience the site without spoken interpretation. The revenue from this program will top \$200,000 this year.

There is no question that growing interest in the supernatural and paranormal has been a trend in American culture over the past decade. This is the kind of observable fact that entrepreneurs ponder. Does this trend offer an opportunity to generate revenue in support of one's mission? Leaders with an entrepreneurial bent are more comfortable than others in entertaining, and even capitalizing on, this possibility.

Is this a compromise in values? Some may think so. However, just as the Strong Museum leaders lived with ambiguity as they realigned their mission, it may well be that in time the spiritual dimension of historic places will come to be viewed as a legitimate way to experience the past. Stay tuned. ●

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