

# History Leadership Institute

## Class of 2018 Schedule & Session Descriptions

Max A. van Balgooy, Director • (301) 412-7940  
Version October 4, 2018

All sessions occur in the Day Classroom of the Indiana Historical Society (450 West Ohio Street, Indianapolis; parking in rear; enter from parking lot side via the loggia), unless otherwise noted. Some sessions require reading or preparation in advance. Saturday afternoons and Sundays are free days. This schedule is subject to change; please watch Basecamp for announcements.

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

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

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#### Sunday, October 28

**3:00-6:00 pm Arrivals**

Check-in to the Residence Inn Downtown on the Canal. Receive room assignment from front desk at hotel and then proceed to Canal/Walker Room for more information.

**6:00 pm Informal Welcome to HLI and Indianapolis (Canal/Walker Room)**

Informal gathering of HLI Class of 2018, staff, and Partners.

#### Monday, October 29

**9:00-10:00 am Welcome (Day Classroom, IHS)**

An introduction to HLI, its goals and major supporters, with rules of the road and logistical details. *Max A. van Balgooy, Director, HLI 2017*

**10:00-11:00am What's Where?**

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

**11:00-1:00 pm Introductions**

Time to get better acquainted with your colleagues. Each of you will have eight minutes (that's 8 minutes) to introduce yourself and your work in a memorable way. Visual aids are welcome (if you need to use AV technology, warn us in advance so we can prepare).

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

If introductions haven't been completed, we'll take a quick break and continue over lunch.

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

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

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

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

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

Dinner together at local restaurant; separate checks.

### Tuesday, October 30

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

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

**9:00-12 noon The Relevance of Public History – Part 2**

We continue to consider the relevance of our work with a discussion of the History Relevance Campaign. How can we shift the way we talk about history so that others readily see its value? How can we design programs, exhibits and engagements that have a positive impact on communities and individuals? How can we demonstrate that impact and make the case for history? As a case study, we'll be exploring the historical markers of Indiana. *Tim Grove, David Young, and Chandler Lighty, Executive Director, Indiana Archives and Records Administration, HLI 2017*

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

Throughout the program, the session facilitators, HLI alumni, and IHS staff will join us for lunch for an informal opportunity to chat and explore ideas.

**1:30-4:30 pm Live Your Mission**

This session will look at the fundamental questions of who we are, what do we do, and why? Answering these questions through vision, mission, and values can provide the compass our organizations need to succeed. A strong organizational identity and purpose allows us to create sound strategies, maintain good relationships with stakeholders, foster an environment of creativity and calculated risk-taking, and better positions us to know when to say yes—and when to say no—to new opportunities. *Erin Carlson Mast, President and CEO, President Lincoln's Cottage, HLI 2008*

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4:30-5:00 pm Closing

### Wednesday, October 31

8:30-9:00 am Getting Started

9:00-12 noon **Achieving Impact through Intentional Practice – Part 1**

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

12:00-1:00 pm Lunch

1:00-4:30 pm **Achieving Impact through Intentional Practice – Part 2**

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

### Thursday, November 1

8:30-9:00 am Travel (bus)

9:00-12 noon **Conner Prairie – Part 1**

This is a full day at Conner Prairie, one of the most visited outdoor museums in the country whose mission is that “every guest has the opportunity to pursue knowledge and fun in a way that is tailored to them.” We’ll see how they’ve pursued this goal by examining the design and evolution of several programs from exhibitions to theater. Conner Prairie closed for the season in October, however, they’re opening a few places especially for HLI so we can experience them. *Norman Burns, President and CEO, Conner Prairie, HLI 1991; Richard Cooper, Vice President and Chief Programs Officer, Conner Prairie, HLI 2009; Ellen Paulin, Manager of Interpretation, Conner Prairie, HLI 2016*

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

1:00-5:00 pm **Conner Prairie – Part 2**

5:00-6:45 pm Dinner (provided)

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### 7:00-9:30 pm Follow the North Star (two groups)

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

### 9:30-10:00 pm Travel (bus)

## Friday, November 2

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

### 9:00-10:15 am Reflections on the Field Trip

This is a facilitated discussion on field trip to identify strengths and weaknesses of the previous day’s experiences, but also consider the major opportunities and challenges facing history organizations today. *Max van Balgooy*

### 10:15-10:30am Break

### 10:30-12 noon Difficult Histories, Contested Stories

We will discuss the current challenges associated with presenting contested histories and explore some current practices in the field. We will also explore the ideal characteristics of interpretive experiences that are inclusive and relevant. *Sarah Pharaon, Senior Director, International Coalition of Sites of Conscience and Richard Josey, President and Principal Consultant, Collective Journeys LLC, HLI 2008*

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

### 1:30-4:30 pm Confronting Difficult Histories

For the past five years, Richard and Sarah have worked as colleagues and co-facilitators around issues of race, slavery and mass incarceration. They'll work with us to share tools to navigate difficult and often contested histories and their contemporary legacies so that we might better challenge visitor perceptions, foster dialogue, and spark civic action. *Sarah Pharaon and Richard Josey*

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

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### Saturday, November 3

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

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

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

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

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

**6:00 pm HLI and IHS Party at Marianne Sheline's house (optional)**

122 N. Bancroft Street, Indianapolis

Chili and beer provided

Details and RSVP: <http://evite.me/mFaBT7CddN>

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### Week Two: Challenges and Opportunities Facing Leaders

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#### Monday, November 5

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

**9:00-12 noon Transforming the Experience of Objects**

In this era of change and innovation, the ways in which we collect, manage and use historical collections are changing. We will engage in discussion with two people who are leading this change, addressing fundamental questions concerning what we collect, how to gain intellectual control of what we have, and how to best use artifacts to engage others in meaningful and relevant history. *Trevor Jones, Executive Director and CEO, Nebraska State Historical Society, HLI 2009; Elee Wood, Fielding Curator/Educator of Early American Art, Huntington Library, Art Galleries, and Botanical Gardens*

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

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

**1:00-2:30 pm Collections at the Indiana State Museum**

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

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

**3:00-4:30 pm Collections at the Indiana Historical Society**

The Indiana Historical Society preserves and makes accessible one of the largest archival repositories of manuscript, printed and visual materials on the history of Indiana and the Old Northwest, including more than 800 broadsides; 1,700 cataloged maps; 3,500 pieces of sheet music; 5,450 processed manuscript collections; 45,000 cataloged printed items 70,000 digital images online representing 61 collections; and 1.7 million photographs in 615 visual collections. *Suzanne Hahn, Vice President, Archives and Library; Susan Sutton, Director, Digitization; Kathy Lechuga, Book Conservator; and Stephanie Gowler, Paper Conservator, Indiana Historical Society*

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

#### Tuesday, November 6

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

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### 9:00-12 noon **21st Century Historical Interpretation**

Since 1998, the National Association for Interpretation has certified more than 30,000 interpreters at varying levels across the globe. Though our program is well respected, NAI embarked upon a project in 2014 to update and revise our standards. During this session, you'll learn more about the research & process we've undertaken and will be the first group to react to the new standards (which will be formally released in late November). Participants will also help NAI create a possible new certification for interpreters in their field. *Emily Jacobs, Certification & Training Program Manager, National Association for Interpretation*

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

### 1:30-4:30 pm **21st Century Historic Preservation**

Preserving and advocating for authentic historic places offers a wide range of challenges and opportunities. We'll hear from one of the strongest historic preservation organizations in the nation about what's happening now in Indiana; how museums and historic sites can be involved in advocacy (or historic preservation in general); and trends they envision for the 21st century. *Todd Zeiger, Director, Northern Regional Office, Indiana Landmarks*

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

## Wednesday, November 7

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

### 9:00-12 noon **History Leaders Responding to Public Tragedies: The Right Thing?**

From Charleston to Las Vegas, Boston to Brussels, public tragedies have become all too commonplace. Should history leaders respond? Why or why not? If so, what might they do help minimize such tragedies from occurring in the first place? What might they do both immediately afterwards and in the long term to sustain healing? What are both the risks and the rewards? Drawing on his own experience and that of others, George will lead a discussion about such questions. *George McDaniel, President, McDaniel Consulting*

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

### 1:30-4:30 pm **If You Aren't Advocating, You Aren't Leading**

Every organization has advocacy challenges—people who have a say in its future but who don't yet share its vision. From mayors to senators, and from community members to funders, these are the people whose support can position an institution for success. We will analyze the case for advocacy, examine its core elements, and devise advocacy strategies that can deliver results for your organization and for the field. *Ben Kershaw, Director of Public Policy and Government Relations, Independent Sector*

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4:30-5:00 pm Closing

### Thursday, November 8

8:30-9:00 am Getting Started

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

9:30-11:30 am **Indiana Medical History Museum**

We will tour the museum, learn about its history and current programs, and discuss its challenges and opportunities for preservation and interpretation. *Sarah Halter, Executive Director, Indiana Medical History Museum, HLI 2017*

11:30-12 noon Travel (bus)

12:00-1:00 pm **Lunch at the Children's Museum of Indianapolis** (on your own)

1:00-2:30 pm **"The Power of Children"**

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

2:30-3:00 pm Travel (bus)

3:00-4:30 pm **Benjamin Harrison Presidential Site**

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

4:30-5:00 pm Travel (bus)

### Friday, November 9

8:30-9:00 am Getting Started

9:00-10:15 am **Reflections on the Field Trip**

This is a facilitated discussion on field trip to identify strengths and weaknesses of the previous day's experiences, but also consider the major opportunities and challenges facing leaders today. *Max van Balgooy*

10:15-10:30am Break

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### **10:30-12 noon Leadership and Decolonizing Museum Practice**

Cinnamon will provide an introduction to decolonization in museums using the framework developed by Amy Lonetree (collaboration, privileging Indigenous voice and perspective, and truth telling of history) and its relationship to the history of museums in the U.S. She will also share the process underway at the Abbe Museum and a few other museums. *Cinnamon Catlin-Legutko, President and CEO, Abbe Museum, HLI 2004*

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

Recommended for your convenience: Eiteljorg Museum

### **1:00-3:00 pm Interpreting and Presenting Native Americans in Museums**

We'll visit the Indiana State Museum and Eiteljorg Museum of American Indians and Western Art to see how current exhibitions are interpreting and presenting Native American history and culture. *Scott Shoemaker, Thomas G. and Susan C. Hoback Curator of Native American Art, History and Culture, Eiteljorg Museum of American Indians and Western Art; Johanna Blumehope, Associate Curator of Western Art, Eiteljorg Museum of American Indians and Western Art; Michele Greenan, Director of Archaeology, Indiana State Museum*

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

### **3:30-4:30 pm Decolonization at Your History Organization and Beyond**

A facilitated discussion on the presentation and interpretation of Native Americans by history organizations, if and when decolonization is appropriate for your organization, and how Lonetree's framework could be adapted for other ethnic or cultural groups. *Cinnamon Catlin-Legutko and Scott Shoemaker*

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

**TBD Reception, Eiteljorg Museum (optional)**

## **Saturday, November 10**

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

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

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

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

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### Week Three: Strategic Thinking

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#### Monday, November 12

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

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

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

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

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

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

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

**6:00-7:30 pm CEO Confidential**

This conversation with CEOs provides an informal opportunity to confidentially discuss the wicked and thorny issues facing history organizations and the people who work in them. *Becky Beaulieu, Larry Yerdon, John Herbst, President and CEO, Indiana Historical Society, and Keira Amstutz, President and CEO, Indiana Humanities*

#### Tuesday, November 13

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

**9:00-12:00 am Making History Inclusive and Equitable**

How can different perspectives on diversity make history more inclusive and equitable? Our facilitators have explored this question through several recent projects and we'll discuss this topic by examining AAM's "Welcoming Guidelines for Museums" (2016) and the significance criteria for the National Register of Historic Places. *Susan Ferentinos, Public History Researcher, Writer, and Consultant, HLI 2008 and Modupe Labode, Associate Professor of History and Museum Studies and Public Scholar of African American History and Museums, IUPUI*

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

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### 1:30-4:30 pm **Facilitating Change in Your Colleagues and Staff**

It is no secret that history organizations, from singular historic house museums to large state historical societies, are succeeding by changing. The changing nature of the work of public history—whether it’s content, community, strategic planning, or funding—is driving different approaches, deliverables, and models. We’ve all heard the adage “change is hard.” How do you bring colleagues, managers, staff, volunteers, and maybe even your CEO to a place of understanding? Let’s talk about how to train, coach, model, push, and lead change. *Norman Burns; Donna Sack, Vice President of Community Engagement and Audience, Naper Settlement, HLI 2007*

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

## Wednesday, November 14

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

### 9:00-12 noon **Developing Layers of Leadership**

Anne will be presenting two topics that need to be on the radar of every museum leader: gender equity in the museum workplace and their own and their staff’s access to ongoing leadership training and development. We’ll look first at the “Layers of Leadership” research that was developed by Educopia, the Center for Creative Leadership, and more than 30 partners representing the library, archives and museum fields as part of a three-year IMLS-funded project assessing the spectrum of leadership training and development across the three sectors. The second half of the session, Anne will share insights about the state of gender equity in the museum field. Today, according to the Bureau of Labor Statistics, women make up nearly 47 percent of the museum field, working in virtually every job title and every museum discipline, but persistent inequities plague wages, benefits, and access to advancement. *Anne Ackerson, co-author, Leadership Matters and Women in the Museum: Lessons from the Workplace*

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

### 1:30-4:00 pm **Applying HLI to Your Organization**

We’re coming up to the end of HLI and you are probably bursting with ideas. How do you choose which ones will have the greatest impact? In this session, several HLI alumni will discuss how they navigated the months and years that followed their graduation. *Kat Burkhart, Director/Curator, Carnegie Museum of Montgomery County, HLI 2004; Aaron Genton, Collections Manager, Shaker Village of Pleasant Hill, HLI 2016; Tamara Hemmerlein, Director, Local History Services, Indiana Historical Society, HLI 2007; Jessica Stavros, Development Officer for Historic Sites, Indiana State Museum & Historic Sites, HLI 2016; facilitated by Max van Balgooy*

### 4:00 pm **Closing**

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4:30 pm      **Class Photo**

### Thursday, November 15

8:30-9:00 am    **Getting Started**

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

We will engage in an exploration of management, leadership, and followership that can serve you in meeting challenges of everyday work life and issues facing the museum field. Essential in this exploration is the notion of leadership and followership as fluid roles enacted by individuals across an organization as opposed to the traditional view of leadership residing with those in positions of authority and followers being everyone else. Using the a couple of pre-assigned readings and reflecting on your past three weeks, I invite you to take a broad look at leadership and followership as intentional features of professional practice. We will explore the strategies and implications —whether as the director, program manager, or colleague —for leading and following for impact and change.

*Julie Johnson, Co-Founder and Owner, J2R2 Leadership and Change Associates LLC*

12:00-1:30 pm    **Lunch**

1:30-4:30 pm    **Integrating Learning Back Into the Workplace**

The session will include a guided discussion about your plans for going home and returning to the office. This session will help you deal, conceptually and emotionally, with balancing life and work, with setting priorities and managing your time, and with leading and managing successfully in the months and years ahead. *Julie Johnson*

4:30-5:00 pm    **Closing**

5:30-? pm      **Festival of Trees**

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

### Friday, November 16

8:30-9:00 am    **Getting Started**

9:00-10:00 am    **Weekly Review**

10:00-12:00 n    **Parting Thoughts**

With representatives of HLI's sponsoring institutions sitting with us, share your thoughts and comments on your three weeks in Indianapolis attending HLI. Also discuss how you might put newly acquired ideas and skills to work, maintain

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friendship and connections made during the seminar, and your readiness to address some big issues you left behind at your institution or perhaps take on some newer, bigger challenges in the field.

- 12:00-1:00**     **Graduation (Theater)**  
*John Dichtl, President and CEO, American Association for State and Local History, HLI 2004*
- 1:00-1:30 pm**   **Lunch** (provided)  
HLI Partners and Alumni invited
- 4:00 pm**        **Closing Party**  
The spotlight is now on you, Class of 2018, as you celebrate your time together at HLI with an event you been planning just for this occasion.

### Saturday, November 18

**Departures and Good Byes!**  
Rides available to airport (contact Marianne)