

**National Archives, Mid-Atlantic Region
Planning/Interpretation
Grant awarded February 2004**

Quality of Past and Current Programs

- 1. Provide a very brief history of the organization. What is the mission of the organization? (Please state exactly as Board-approved):**
- 2. Describe recent programs, exhibitions and activities. Describe how they are linked to the mission and strategic plan. Describe the evolution of programming over the past three years, including any risks taken. Which programs and exhibitions have been most successful? Why? If the organization does regular exhibitions, how many are permanent? How many temporary exhibits are on display annually? What is the total percentage of space allocated to exhibitions?**
- 3. Describe the organization's constituent groups and audiences. Include demographics (age, ethnic groups, communities). How does the organization determine and respond to constituent needs? How are constituents involved in the organization in an on-going way?**
- 4. How are programs and exhibitions developed at your organization? Who is involved in the planning process? What is the Board's role in program planning and approval? How are constituents involved in programming decisions?**
- 5. Describe the use of scholarship in interpretation and/or preservation.**
- 6. Describe program evaluation efforts. How is data collected integrated into program planning?**
- 7. Describe the professional development opportunities available to your curatorial, exhibitions and program management staff. Explain how these opportunities have changed the program or exhibition development process at your organization.**
- 8. Describe the organization's collections (including historic structures). What is the historical significance of the collection? What aspects of the collection are unique to the region? For historic sites, what percentage of the collection has direct provenance to the site? What is the architectural significance of any historic structures?**
- 9. How do you market your programs? (Advertising, direct mail, signage, media)**
- 10. How does your organization plan for succession of staff and Board leadership?**

The Mid Atlantic Regional Program is one of nine regional operations of the National Archives. The National Archives, an independent agency, Archives is the official recordkeeper of the American democracy. It preserves and makes accessible the historically valuable evidence of

our national experience from the First Continental Congress to modern times. Among National Archives' strategic objectives is to enhance the education and cultural usefulness of the records and historical documentary materials it holds. The objective includes embracing a wide range of other public programming endeavors, including exhibitions, publications, civics initiatives, and research.¹ However this work can only be accomplished with combined public and private support.

The Mid Atlantic Branch is one of nine regional programs of the National Archives. It opened in 1969 as a part of the General Services Administration under a restructuring of the National Archives to provide community-based services to the federal community and the public. The operation is a life-cycle records program, thus ensuring that the records of the American democracy from federal regional operations in the states of Delaware, Maryland, Pennsylvania, Virginia and West Virginia are preserved and made accessible in the Philadelphia regional archives. The archives facility is located in the Robert Nix Federal Building. The holdings comprise over 110,000,000 documents covering the period 1790 to the present and reflect the regional work and impact of over 70 federal agencies. The stories in the collections evidence Mid Atlantic residents' rights and entitlements, the policy and decision making of national government and the government's engagement with the residents of the Mid Atlantic and vice versa.

The Mid Atlantic Archives has operated out of the Robert Nix Federal Building since 1984. This structure was originally built as a U.S. Post Office. When it opened, the Archives was only accessible via the Post Office with a small exhibition space. Today, our facility is accessible via a private entrance on Chestnut Street (between 9th and 10th), has more than doubled its exhibition space (to 2,000 sq. ft.), and offers a number of educational and cultural programs to the public and in support of local educators, regional residents and tourists. These programs attract approximately 12,000 people to the site annually. Additionally, our operation offers a number of public programs, lectures and events offsite.

Our program has embarked on building new audiences and developing new public programs and services. This effort was initiated because our service data revealed declining numbers in our traditional clients, which are largely genealogists.² Our new agenda defines strategies to build new partnerships, link our programs to broader community efforts, and identify and develop new audiences for the Mid Atlantic program. Our efforts build on our unique niche and position as the federal life-cycle records program for the Mid Atlantic. They tie together our capability to link our federal and non-federal constituents. Our institution is the only history organization in Philadelphia with collections that evidence the Mid Atlantic's position in our national experience, namely the official story of the American democracy in the Mid Atlantic. Our efforts also build on our firm commitment to making the Mid Atlantic Branch a strong

¹ The National Archives Building is undergoing a major renovation that will result in enlarged exhibition space, a new 294-seat documentary film theater, a Learning Center for parents, teachers and students. Other operations around the country are undergoing similar transformations of expanding public programming through exhibitions, onsite programming and collaborations with regional and local institutions.

² With the advent of more genealogy resources being available via the Internet, National Archives facilities nationwide have been experiencing declining numbers.

community partner with other cultural institutions and a resource that contributes to the quality of life in the region.

Although still in the formative stages, our efforts have begun to produce the desired results. Whereas other National Archives regional programs have experienced as much as a 50% drop in patron attendance, the Mid Atlantic program is showing only a 7% drop in attendance at our site. Attendance at our public programs more than doubled this past fiscal year. Much of this success is due to the regional program's willingness to take risks and venture into new arenas with public programs. These are being undertaken with the full support of our Washington, D.C. division chief, Assistant Archivist for Regional Records Services. Outlined below are some of the efforts and impacts. Appendix A are photographs of some the activities captioned below.

The Regional Administrator is devoting 75% of her time to regional outreach efforts and has realigned the regional management structure in order to allocate leadership time in this manner. The region has established an operations director to oversee the day-to-day management of the region, thus freeing the administrator to devote the majority of her time to strategic projects, forging alliances, and capacity building. This is a significant and important change in the way the Mid Atlantic Branch has operated. In the past the Regional Administrator's Office has been in the Northeast our Townsend Road (Byberry East Industrial Park) facility, 22 miles from Center City. The office has moved to Center City Philadelphia, more convenient to other cultural and community leaders. She is participating broadly in a number of cultural and community forums.

The Region launched a regional web portal on July 1, 2003. The Mid Atlantic program is the first National Archives regional operation to have a website (www.archives.gov/midatlantic). This site permits us to define ourselves as a cultural institution within the Greater Philadelphia community and provides the framework for us to create virtual service communities, as well as be linked virtually to others. Our website is an important platform for growing audiences through Internet communication and marketing. The site is also a significant opportunity to share our exhibit gallery to a broader audience and also connect our gallery program to education resources on our site for use in schools. We are now linked into such public resources as www.gophila.com/culturefiles.

The Archives is building a partnership with the Philadelphia School District's Teaching American History grants. Since the fall of 2002, the program has hosted teachers participating in the Philadelphia School District's Teaching History Grant, *Immigration and Migration*, supporting over 45 teachers in extensive professional development to improve their ability to teach social studies and use primary resources in their classrooms. The Mid Atlantic program has provided several successful customized workshops and serves as the principal research site for the grant teachers' special projects. The teachers, in turn, are supporting the Mid Atlantic exhibition efforts, by helping to extend exhibit products for classroom use. This collaboration is also helping the Mid Atlantic program to strengthen its capacity to service more school groups and teachers in the facility, as well as support education outcomes throughout the region via the Internet. The success of this initiative has led to a formal collaboration with the School District

in its third Teaching American History grant for nearly \$850,000, which will train an additional 90 teachers over three years beginning in spring 2004.³

The region now participates in the Philadelphia's culture, tourism and business networks.

Although the Mid Atlantic program region has been member of the Cultural Alliance for more than seven years, it has only recently moved beyond this alliance into affiliations that can support broader marketing of the program. The region is now part of the Greater Philadelphia Chamber of Commerce's Cultural Pass program and is featured on both streetscape signage and in the Independence Visitor Center Regional Tourism Hall and Concierge. The institution is promoted as a significant regional cultural resource through the Greater Philadelphia Marketing and Tourism Corporation and the WherePhiladelphia program. The branch is also a member of the Greater Philadelphia Chamber of Commerce and as such has leveraged great value out of this member by hosting 130 Chamber members this past summer in our exhibit gallery, promoting our program via the Chamber's website (400,000 monthly hits) and newsletter (distributed to its 6,000 member company).

The regional program is building a partnership with the region's public libraries. Following a meeting between the President of the Free Library and the Regional Administrator, the Mid Atlantic Archives is forging an alliance with the Philadelphia Free Library system to enhance education and culture programming in the Library's after-school program (LEAP), which operates services out of 54 public library facilities in Philadelphia neighborhoods servicing over 24,000 children. This alliance will help build awareness in Philadelphia neighborhood about the availability and public services at their local National Archives office, as well as bring authentic materials into the Library's network for use by the children.

Over the past 18 months, the Mid Atlantic joined two important history/research consortia and with other history institutions. The regional program is working with the Civil War Consortium and the Philadelphia Area Consortium of Special Collections Libraries to build broader audiences for cultural resources as well as develop outlets for its own collections. The program is also collaborating with the African American Museum of Philadelphia and the National Constitution Center to commemorate the 50th Anniversary of Brown v. Board of Education in May 2004.

The region has renovated its gallery space and facility. The exhibition gallery of the Mid Atlantic Branch has undergone a major transformation within the last year. Funded by National Archives appropriated money, the renovated gallery is now a contemporary venue for the public to be engaged with the records of the American democracy and the stories in these records. The space incorporates interactive kiosks, traditional exhibition displays and hands-on opportunities for patrons to inspect historical records. The design concept is audience-friendly, suitable for school-age children and adults, and allows patrons a chance to explore the collections of the National Archives Mid Atlantic at their own pace, on their own terms. They are enticed by welcoming signage stating: "Discover Your Past". The galley layout also allows for changing displays. This space is currently being used to show a variety documents that have attendees ponder the Constitution as a living document of the American democracy. The stories currently

³ The Mid Atlantic Branch was not a named collaborator in the School District's Immigration grant, although its site has served as the principal research facility for the teachers.

featured in the new gallery are drawn from research conducted by staff and several scholars, who have used our collections. One of the featured stories also anchors our facility to the Nix Building by telling the story of the Robert Nix Family through the Census records in the National Archives. The facility upgrades also includes improvements in our conference/training room (with both expanded technology capacity and seating (to 80 persons capacity). This enables us to offer complementary public events and lectures for our gallery exhibits. In 2004 we plan to hold our first such event, when a new 100 sq ft temporary panel is installed. This new panel, designed and fabricated by Kim Tieger, will tell the story of Philadelphia as the seat of the first national government and the Constitution as a working instrument of governance during the early days of the democracy. The storyline for this new feature was developed in consultation with acclaimed historian Gary B. Nash. The primary research for the exhibit was conducted by our senior archivist, Jefferson Moak, and historian Billy Gordon Smith, author of The Lower Sort: Philadelphia's Laboring People, 1750-1800.

Unlike our prior exhibition efforts, our current effort is an outgrowth of our work directly with constituents (like the Philadelphia grant teachers) and other cultural institutions. It is also based on collaborative work among the curatorial staff, not just the work of a single individual, and with established scholars. It is also making use of professional exhibition design and fabrication professionals. Moving in this direction has required training via AASLH for staff in working with consultants and contractors, as well as supporting their participation in the local museum professional organization. This has opened up more capacity within the staff ranks and is providing growth and new skills learning for staff.

Quality of Project, Project Planning and Impact

Quality of Project and Project Planning

- 1. Describe the planning project.**
- 2. How does this project relate to the mission of the organization?**
- 3. What is the intended purpose of the proposed project? What are the goals? Explain (e.g., education, civic dialogue, increased organizational capacity)**
- 4. What central ideas and themes will you explore for the proposed project? How do these themes connect to universal human experiences and/or contemporary concerns?**
- 5. Describe how the project will incorporate/reflect current scholarship.**
- 6. How will the project integrate diverse voices, experiences and points of view?**
- 7. Explain why this is an appropriate platform for your subject. How does audience research and other forms of evaluation support this choice?**
- 8. If this project utilizes your collection, briefly describe the objects the project will use.**

- 9. Explain why this is the next logical step in the organization's development. Cite any plans, studies or assessments documenting the need for this project. Explain the decision-making process behind the selection of this idea as a program/exhibit topic.**
- 10. Who are the staff and consultants that will work on the project? How do they contribute to the planning process? What new approaches will be used to plan this project?**
- 11. How will this project challenge the organization? What risk will it assume in carrying out this project?**
- 12. Describe the final outcome of the planning process.**
- 13. Describe any marketing efforts planned for the project at this time.**
- 14. How is Board commitment to the project demonstrated?**

Impact of Project

- 1. Will the community have a role in this project? How will it be involved? How will the organization sustain community involvement throughout the project? After the project is over?**
- 2. Identify the target audience for the project, and explain how you expect to reach and engage it. Be as specific as possible. Include projected numbers of people affected and explain how these numbers were estimated.**
- 3. How will you measure the project's success, in terms of its impact on constituents, the institution and the professional field?**

Summary:

This project will establish the framework and direction for exhibition and public programs in the National Archives Mid Atlantic Archives. With the assistance of an expert museum consultant, an audience development marketer, and a regional history expert, the Mid Atlantic Branch will identify some of the best stories and themes to be explored in exhibition from its collections, determine which of these prospects would appeal to various audience groups (both current and potential), and lay the foundation for building staff capacity to execute a temporary exhibition program. The grant will fund the work of the consultants, focus group participation, and staff development and outreach to learn from best practices. The project will produce a five to seven year strategic and interpretive framework for exhibition and public programs.

The project will address three key interrelated components of effective exhibition planning: 1) audience identification and development; 2) collections use; and 3) institutional capacities. A museum consultant will lead an assessment of our exhibition program capacity and will produce findings that address both exhibit program development and potential regional partnerships. The consultant's work will be supported by content specialist regarding collections, both in-house and

regionally located, and by marketing expert who will assess audience interests as well as opportunities and requirements to grow new audiences.

Project Description:

As a regional operation of the National Archives one of our strategic objectives is to bring the holdings of the National Archives to people no matter where they are and to enhance the educational usefulness of the records and historical documentary materials in the National Archives. This includes developing ongoing relationships with institutions and programs in the communities in which facilities are co-located, as well as beyond. It requires expansion of existing public programming and exhibitions, as well as developing new endeavors that are consistent to modern curatorial, education, scholarship and museum practices.

The Mid Atlantic Archives has had an exhibition program since 1984. It was a leader among the National Archives regional offices in this type of public activity. However, from inception the program operated without a strategic framework; exhibitions were essentially ad hoc. Consequently, the Mid Atlantic program is not structured to take full advantage of the cultural landscape in the region --- particularly newer efforts in cultural tourism. The methodologies and approaches to exhibition reflect an older professional paradigm. Exhibitions are entirely a home grown product, often reflecting the personal and professional interests of Mid Atlantic archival and curatorial staff. Although most of the topics have been accessible to broad public audiences, both presentation and outreach have limited audience. Based on today's standards, however, the presentation is not museum quality except for the tiniest cultural institution. A few exhibitions have involved broad participation of scholars or collaborations with other institutions and community based organizations. When these occurred, they have resulted in the most successful projects for the regional office. The Mid Atlantic program has had several of its exhibitions covered in feature articles in regional newspapers, including the *Philadelphia Inquirer*. This coverage confirms that the collections of the National Archives are a rich cultural resource to the region.

Our activities over the past 18 months has positioned us to take on this endeavor as a next logical step. We have greatly strengthened our alliances in the cultural community and implemented new approaches and processes to participate more fully in the regional community. Our recent upgrade of our facilities, as well as the support we received this past spring from HPP for a needs assessment have also positioned us to take on a next level of activities with our exhibitions and public programs. Our two greatest needs are: 1) to identify audience interests and prospects; and 2) to determine how to establish an effective exhibition program specific for our region. We are committed to having a quality exhibition program. However, we need the support from HPP to determine what that program should look like and what should be our exhibition priorities for the next five to seven years. These are all issues outlined in the findings by David Kahn, who conducted the needs assessment.

The HPP project will develop both a strategic and an interpretive framework to bring more audiences to become familiar with the Mid Atlantic collections through exhibitions. The plan will provide a framework to strengthen areas of weakness in our current program, addressing infrastructure (organizational capacity), staff development, exhibit planning and content, and audience. We will utilize the services of a number of consultants for this endeavor.

- The principal consultant, Janet Kamien, is an expert in overall museum/exhibition planning. She will be supported by a marketing consultant with expertise in audience development and an interpretive consultant who will conduct focus group sessions with scholars, researchers and community people who have used our collections. The museum consultant's study will address infrastructure, staff development and exhibition planning and execution. Ms. Kamien will also be responsible for bringing together all of the findings of the other consultants into a final exhibits program planning document.
- Randi Korn and Associates have agreed to serve as the audience development marketing expert. This firm will bring together both current regional research and new research (undertaken via the HPP grant), identifying what potential audiences would be interested in seeing in exhibitions and public programs at the Mid Atlantic Archives. This will include some assessment of interests by tourists to the region.
- The interpretive (content) expert, John Alviti, will identify opportunities for linkages with other cultural institutions, based on the strengths of our collections and their links to other regional collections. He will pull together feedback and recommendations from two focus group panels of scholars, researchers, community people and staff, who have made extensive use of Mid Atlantic holdings and/or have extensive regional knowledge around collections exhibitions. This aspect of the project utilizes the most recent scholarship conducted in our collections as well as brings diverse perspectives and voices to our assessment process.

The following summarizes the roles and responsibilities of all project participants.

Museum Consultant:

- Evaluate our overall program capacities and develop strategies to address areas of growth and development.
- Guide staff through some basic training in the exhibition planning process and in their outreach efforts to learn from the best practices of other institutions.
- Produce the final strategic and interpretive report that pulls together the findings of the two other consultants and the assessment of internal program capacities and strategies for exhibition.

Audience Development Marketing Consultant:

- Determine audience interests in exhibitions at the Mid Atlantic Archives.
- Evaluate opportunities and needs to reach tourism market, drawing from current and new research.
- Produce a report on audience development and outreach.

Interpretive (Content) Consultant:

- Facilitate focus group discussions with expert scholars and researchers and Archives staff to determine significant stories and themes that reside in our collections.
- Evaluate opportunities for collaboration with other regional institutions.
- Produce a report of findings from the focus group and assessment of potential regional partners.

Content Focus Group (List attached)

- Provide insights and recommendations regarding potential exhibition themes and related public programs.

Mid Atlantic Archives Staff, who will be lead by Stacie Byas, Archives Director:

- Provide insights and recommendations to consultants.
- Participate in content focus group.
- Participate in program assessment conducted by museum consultant.
- Review consultants' findings and assist in developing implementation strategies.
- Participate in training and development opportunities provided by the grant. The grant will support attendance by two staff members to the 2004 AASLH Annual Meeting (*Exploring Resources for Growth*) in St. Louis Missouri.

Staff Group Leader (Stacie Byas)

- Participate in planning and project management meetings.
- Provide leadership to staff in working with consultants to ensure successful completion of project.
- Arrange staff schedules to participate in the project.
- Oversee the day-to-day engagement of consultants with the Mid Atlantic Archives.
- Participate in the final consultants' briefing and support the preparation of final reports to HPP and the Assistant Archivist - National Archives Regional Services.
- Jointly with regional senior leadership, develop budgets and workflow changes to implement new exhibitions program.

Grant Administrator (V. Chapman-Smith, Regional Administrator)

- Ensure successful completion of the grant project.
- Participate in planning and project management meetings.
- Oversee consultants' contracts and expenditures of all funds from the grant.
- Resolve any issues that cannot be addressed by Staff Group Leader.
- Prepare and provide final reports to HPP and the Assistant Archivist – National Archives Regional Services.
- Ensure implementation of new exhibition efforts.

There are four goals to this project:

1. Identify opportunities and strategies for audience development, including linking the exhibit program to the current cultural tourism environment. Develop the marketing and outreach framework that can help boost audience for exhibits and related public programs.
2. Develop an outline of exhibition themes/subjects to be pursued over the next five to seven years.
3. Identify partnership opportunities to expand exhibiting beyond the current federal facilities (in-house and other federal buildings).
4. Identify the internal capacity requirements needed to move the exhibits program in the desired direction and provide a training foundation to move forward with the developed five to seven year plan.

Each of these goals is aligned with the National Archives' strategic objective for public outreach (stated earlier). Additionally, it is fully aligned with the operational mission and workplan of the Mid Atlantic regional office. As mentioned earlier, the Mid Atlantic office is pursuing a number of efforts to strengthen its support of the regional community and to make its facility more accessible to the public. Much of this initial effort has been accomplished because of a commitment made by the Assistant Archivist - National Archives Regional Services. Over the last 18 months, the Mid Atlantic office has received over \$200,000 in additional operating support for facilities improvements. These improvements have greatly increased the visibility of the facility from the street and upgraded the exhibition gallery and public programs space.

The HPP project's success will be measured in two ways. The first is in obtaining the desired report product from the study and foundation training for staff. The other aspect of the project's success will be measured in the execution of the report. The final report product will guide the direction of the organization over the next five to seven years. The training for staff as well as their participation in shaping the new exhibitions process will enable staff buy-in and provide a knowledge and resource base for implementation. The methods we are using for this project also ensure support and participation throughout the different lines of reporting and responsibility for the Mid Atlantic Branch. This fully engages the most senior level (budget authority and leadership) within the National Archives down through program day-to-day leadership. It ensures that our resource needs for full implementation can be incorporated into plans for resource allocation plans out of our central offices in Washington. The project method engages a broad section of the community: scholars, researchers, special interest groups (educators), everyday people off the street (through the audience assessment process), and members of the cultural community. Lastly, as we execute the new exhibition process that comes from this project, we will continue to measure our performance in both attendance on site and the impact of extending some of our exhibiting to the Internet. These are all measures that are required as part of our management reporting to our Washington central office and to Congress. Our progress will also be reported to the public in the National Archives Annual Report.

Project Budget
National Archives, Mid-Atlantic Region

<u>Category</u>	<u>Heritage Philadelphia Funds</u>	<u>Matching Funds</u>	<u>Total</u>
Personnel (daily rate of compensation x days of work required)			
J. Kamien	18000		18000
Randi Korn Associates	12240		12240
J. Alviti	4480		4480
Content Focus Groups	6000		6000
Supplies and Materials			
Equipment			
Marketing			
Travel/Subsistence			
J. Kamien	3500		3500
R. Korn	1125		1125
Staff	3000		3000
Administrative Overhead (limit to 10% of amount requested)			
Other			
AASLH Conference	500		500
Total			
	48845		48845