



JULY 20, 2020  
ANNUAL REPORT

## ***FROM THE PRESIDENT***

The world looks very different today than it did last year when I was writing my annual report. Between the Covid-19 pandemic and public health crisis, the ensuing economic crash, and the emergence of a strong and ubiquitous civil rights movement that calls for the rebuilding of our justice system with protests and activities across the Commonwealth, the world has come crashing in and changed our public and local history world, probably forever.

The concerns of history organizations have changed dramatically. As I write, all museums are closed, staff and volunteers of most of our constituency — from the smallest historic house to the giants in the field — are just returning to their offices and work stations, but gingerly, to plan next steps in reengaging their work. Many are still working from home, educators are facing not seeing their students in person for the foreseeable future, and everyone is wearing masks and wiping things down — at work and everywhere. Parks, exhibits, sites, workflow, and toilets, everything needs to be reconceived, checked, and rethought. People are being laid off left and right. Any number of history businesses, organizations, and museums may not survive this time.

At the same time, Americans are in the streets, protesting white supremacy and making a commitment to take personal responsibility to bend the course of American society towards the justice Martin Luther King had faith in. Towns — even the smallest — are facing questions about equity and re-fashioning their systems. The change asked for goes far and deep. We are all called to examine our organization or business' policies and work place, not to mention our personal actions. History organizations, on top of that, need to review and change, or perhaps reinvent, public engagement and collecting practices. "May you live in interesting times," the curse goes.

And yet, despite the ongoing and incoming crises, we are living in an invigorating moment. A moment in which people are making history left and right, locally as much as nationally. Historical organizations and their staffs and volunteers are responding with energy and creativity to do the thing they believe in: collect and share history. And this practice, too, needs surgery while the patient is walking: simultaneously document and ask, "what is documenting?"; collect and ask, "who is doing the collecting?" In addition, many report that, amongst the surging difficulties, they are finding new ways to engage a newly eager public, setting up systems to collect people's experiences in the current moment, and finding ways to continue doing their ongoing work, such as collecting oral histories, electronically.

### ***FROM THE PRESIDENT (continued)***

The Mass History Alliance is responding with energy and creativity as well. I never thought I'd say this, but in the current moment we are fortunate not to have a large staff or payroll. Like everyone else, we had to cancel the Mass History Conference at the last minute. We did not want to lay off our small contract staff. In pondering what to do, we turned to the conference committee, the board, and everyone else who'd listen. With all of them, we cooked up a plan to mothball conference 2020 until June 7, 2021, and use our time and energy to create the online portal for the Commonwealth's history organizations and their people we'd always envisioned for the field. I'd like to thank all of them for their enthusiastic engagement of these questions and support for our plans. Fortunately, our sponsors largely agreed to the switch. Thank you so much for sticking with us.

How well the *Mass History Commons* will fare in the future will depend entirely on the response we continue to get — we want and need organizations and sites, professionals, vendors, and educational groups alike to sign up and fill out their profiles. The more the merrier.

All of which will still need more work. But after seeing how the community responded to our shared crises and opportunities, I am more confident than ever that moving forward together is the way to go. And I invite you all to join MHA in carving out that road forward.

Our last annual meeting took place in Palmer, MA, at the Palmer Historical and Cultural Center, on July 15, 2019 at 2:00 P.M.

Fifteen (15) people were present. Twenty-two (22) member organizations voted in the election.

FULL REPORT FOR THE YEAR 2019-2020

**TREASURER AND STRATEGIC DEVELOPMENT & FINANCE COMMITTEE**

---

The MHA fiscal year ends on July 31 of each year.

After the end of last fiscal year, which occurred after the last annual meeting, the Alliance filed its tax return with the IRS and Form PC with the Massachusetts Attorney General.

The Alliance started fiscal year, August 1, 2019 through July 31, 2020, with a balance of \$10,542.33 in checking and \$421.79 in its Paypal account, totaling \$10,964.12.

Expenses and income related to Conference 2019, which took place in the previous fiscal year

During the fiscal year 2019-2020, the Alliance paid for expenses related to follow-up for the 2019 conference in the amount of \$800.00. The Society also collected the remaining \$4,400 from Mass Humanities, the final portion of their support for the 2019 conference.

Expenses and income for activities in fiscal year 2019-2020

The Alliance hired a consultant to put our various mailing lists and email list in order. The Alliance paid \$1,400 for this work.

The Alliance hired two consultants to help with the planning and administration of the conference scheduled for June of 2020. By the middle of March, it became clear that their efforts would need to support the planning for the History Commons instead of the Conference, so the remainder of the unspent money for their contracts was allocated to the Commons.

The Alliance hired a consultant with a contract maximum of \$7,500 for the administration of the stateside local history conference planned for June 2020.

The Society hired a consultant with a contract maximum of \$9,450 coordinating and facilitating the fundraising efforts for the 2020 conference, for administration of the website and registration management for the conference, for public relations and

## Mass History Alliance, Inc.

communications coordinating, for coordinating PR and outreach, keeping the organizing tasks calendar up to date.

### Partners and Sponsors for the Conference and Commons

Mass Humanities. The Society signed a contract with Mass Humanities in the amount of \$10,000 as their support for the Conference for 2020, with \$8,000 due up front and \$2,000 due after the final report. This is substantially less than Mass Humanities' support in the last fiscal year, which was \$22,000. Apparently, our success in fundraising from other sources for the 2019 Conference influenced Mass Humanities to reduce their investment for the 2020 Conference. The Alliance expected a lower amount, but the huge drop was not expected. On the other hand, Mass Humanities has pledged to support the 2021 conference with the same amount.

Other sponsors who pledged their support included Massachusetts SHRAB, Mike Potaski, UMass Amherst Graduate Program in Public History, UMass Boston Graduate Program in Public History, Dorchester Historical Society, House of 7 Gables, Daedalus, Tsongas Industrial History Center, Robert Farrant, Swift River Press, Lynne Bassett, Boston Rare Maps, Metropolitan Water Museum, New Bedford Historical Society, Essex National Heritage, Epsilon, Gilmore Cooke, Digital Commonwealth. Once it became clear that the conference could not go forward, the Alliance contacted the sponsors to obtain their approval to use the sponsorship money for the Commons instead of an in-person Conference. The list above is the list who agreed to sponsor the Commons. Total income from these sponsors (after credit card fees) is \$8,330.20.

The total pledged, although not collected, therefore was \$18,330.20.

By the middle of March, the Alliance had spent \$4,635.71 toward conference expenses, leaving \$13,694.59 to be re-allocated to the Commons. The best guess budget for the Commons is about \$15,500, so the Alliance needs to raise more money or dip into savings. It is possible that the budget for Commons will grow as we have more experience. The Alliance is developing ideas for further fundraising.

There will be no expenses for the use of the meeting room and other facilities at Holy Cross or for food, but there will also be no registration fees from those who would have attended the conference.

### Non-Conference income and expenses

In non-Conference related matters, the Alliance has taken in \$1,375 in contributions toward operating expenses and has spent about \$275 on these costs.

## Mass History Alliance, Inc.

As of the end of May, the Alliance had \$19,634.66 in its checking account and \$1,562.13 in its Paypal account, totaling \$21,196.70.

Assets at the start of the fiscal year on August 1, 2019	\$10,964.12
Assets as of the end of June 2020	\$18,577.72
Contracted expenses for the remainder of the fiscal year	\$3,612.50
Other expenses projected for the remainder of the fiscal year (approximate)	\$500.00

### **SECRETARY**

---

During fiscal 2019-2020 the secretary continued to perform essential duties as outlined in the MHA's bylaws. Those duties included:

- Scheduling meetings of the full board, executive committee, and the annual meeting
- Recording, retaining, and distributing meeting minutes
- Processing, organizing, and filing the MHA's correspondence, contracts, invoices, and reports
- Assisting the Treasurer in matters concerning state and federal filings to maintain the MHA's non-profit status

The Secretary regularly provided administrative support to officers and directors. It was common for the Secretary to field questions concerning the MHA's bylaws. These questions spurred fruitful discussions that evaluated ways in which the board can clarify and streamline processes and procedures as articulated in the bylaws. As should be expected, the Secretary will continue to play an integral role as the MHA expands its board, membership, and programming.

### **COMMUNICATIONS COMMITTEE**

---

During 2019-2020, the Communications committee gained one new member and lost two members. It endeavored to support the maintenance of the public-facing communications platforms the organization uses. These include a website and blog, a listserv, a mass mailing Mailchimp function and a FB page. Committee members also supported the Mass History Commons initiative through messaging and branding.

## Mass History Alliance, Inc.

The organizational FB page increased followers by over 100%, from 174 in July 2019, to 418 in June 2020. The committee experimented with paying for exposure on Facebook with good results.

The committee created an informational flyer and researched pricing and colors schemes for magnets and tote bags. The committee liaised with the Conference committee around messaging and crafting sponsorship letters and requests, clarifying sponsorship levels and designing “swag.”

The committee took the task outlined at the 2019 annual meeting to listen to our membership and find out the state of the field. It worked to craft a set of interview questions and interviewed over 25 historical organizations about their staffing, budgets, revenues, programming, hours, pressing needs and areas of special expertise or aspects of their work that make them unique. This work is ongoing. Liaising with the Mass History Commons team, the committee brought some of these insights into the design and content of masshistorycommons.org.

The committee has two members currently and will look forward to a more structured and routinized administration of communications procedures, a communications strategic plan, and more content and resource development.

### **ADVOCACY COMMITTEE**

---

The task of the Advocacy Committee is to articulate both how the MHA advocates for local history (what channels) and to manage the actual advocacy work (content).

Initial Efforts:

- Committee representation
  - The beginning of the year saw a significant increase in Committee members: (Gavin, Sonia, Amy, Shana, Eric)
- Committee purpose:
  - Advocacy is an essential function of the MHA
- MHA Advocacy was defined:
  - As an effort to help our members advocate on their own behalf
  - As an effort to advocate for the interests of our members and the history community at large.

The Committee reviewed and updated the MHA website Advocacy page and started on an Advocacy Toolkit:

## Mass History Alliance, Inc.

- Created a page description: “The Massachusetts History Alliance advocates to relevant legislators, funders, organizers and administrators in support of the interests of the state’s smaller history organizations. This page identifies the current issues that many of our members consider to be important. The Mass History Alliance also urges its members to advocate on behalf of their own organizations and has provided tools here to assist with this effort.”
- Links to essential legislative websites
- A short explanation of the difference between Advocacy and Lobbying

The Committee reviewed the historical organizations survey and made the following recommendations:

- Suggested additions to the Advocacy Toolkit:
  - A tutorial about effective and impactful use of social media
  - A list of State and Federal funding resources available to small history organizations
- Since funding is a top organizational need for MHA members and other history organizations, MHA Advocacy efforts should be directed at legislative initiatives to provide funds to small history organizations. An Advocacy Alert should be created to identify these pending bills.
- The Advocacy Tool-Kit section needs to be an identifiable part of the webpage. It needs to include components that can help individuals and organizations make their voices heard.
  - An Advocacy Alert section needs to be an identifiable part of the webpage. The MHA can include its own awareness of pending legislative issues or curate those brought forth by others using the lightbulb widget

### Additional Advocacy Plans

- Conference: A planned ‘advocacy breakfast’, where legislators will meet conference attendees (postponed — 2021)
- “Conversation on the Commons”: virtual meetings with invited legislators from different geographic zones — in the planning phase.
- Meetings need to be monthly, with clearly articulated action items
- Continue forward with “Passive Advocacy”
  - Blogs, engaging history critics or pundits, profiles of member organizations, organizational success stories, collaboration success stories, alerts of imminent losses, highlighting history teachers, etc.



## ***CONFERENCE PLANNING COMMITTEE***

---

The MHA conference committee set out to create the 2020 conference with a few new goals, which included lessening the workload for Pleun Bouricius and Patty Bruttomesso, and managing with a lower contribution from Mass Humanities.

We hired Matt Friedman to take on some tasks that were Pleun's in past years, including PR and website work, as well as one that had remained undone last year: sponsor management. Patty's task of managing the conference content creation process with the conference organizing committee is now part of her job at UMass Boston. We hired Caroline Littlewood to take on all of the logistics in putting together the conference day, as well as running the day itself.

The conference organizing committee met twice, came up with a conference focus, and put together a fantastic program for 2020, entitled *History: a Massachusetts Community Activity*. We had just finished the postcard image competition and were transitioning to conference logistics and setting everything in stone when Covid-19 became a reality.

After consulting with presenters, the conference organizing committee, and the MHA Board, we decided to put the program on ice until June 7, 2021. Instead, we resolved, we would build a permanent online network for Massachusetts history organizations and their people: the Mass History Commons. Most of the sponsors were on board with this change in focus.

During the ensuing 12 weeks, the MHA conference committee, along with Friedman and Littlewood, as well as the students who had been working on the conference and Margo Shea, envisioned, built, and partly populated (including all MHA member organizations) an online portal to Massachusetts history organizations at **[Masshistorycommons.org](https://masshistorycommons.org)**

Here Massachusetts history organizations can collaborate; they and businesses and professionals in the field may hang out their shingle; anyone can find a map of history sites and institutions around the state; people in the field can find and/or take skills webinars in public history; find information about a slew of subjects; and can gather to discuss topics of their choosing. Much of that is partly populated, and there is work to do in bringing the Commons to the attention of the myriad businesses, professionals,

## Mass History Alliance, Inc.

and organizations in the field. Other challenges to come include setting up feedback and evaluation processes, and refining the PR to include the sponsors.

Ahead of the launch of the Commons website, we started engaging our audience on April 24 with “Conversations on the Commons,” casual online conversations on the Zoom platforms on topics of interest to the community. Well-known museum consultant and strategic planner Laura Roberts, a conference sponsor, was instrumental in getting this going by moderating the first three Conversations.

These “events” have been running for more than two months. Programs and videos can be found on the Conversations section of the Commons (not live at the moment of writing). They have been inspiring, encouraging, useful (according to feedback), and they — and the attendant PR activities — also give us and the Commons a boost in visibility. It’s been a steep learning curve, but we worked out ticketing, streaming online on our own website, and so on and so forth.

Finally, it became clear that the Commons is a perfect platform for the regional legislator/constituency engagement events the Advocacy Committee had planned — which cannot happen in person. As of writing, plans are underway to start this effort with an event in July.

Now that the Commons is live, we have to raise some funds to support it, as well as the Conversations. It has become clear that we need to continue employing a logistics coordinator for the Commons. Caroline Littlewood has agreed to be that for the coming six months.

We expect to move forward with both Commons and Conference. We don’t know what the coming year will bring, but even if we do not have a vaccine and are not able to host an in-person conference, we will be in a good position to put on a robust event or series of events on the virtual Commons.

### ***NOMINATING COMMITTEE***

---

The Nominating Committee’s task is to recruit new board members, six or seven every year, and in that process communicate clearly the objectives of the organization and the expectations for board members as well as the rewards of serving on the board. The committee opened up board membership to those who self-identified as wishing to pursue election, and are members of a member organization. The call was published widely on all the MHA platforms.

## Mass History Alliance, Inc.

Goals for the upcoming year include:

- To continue to develop an orientation and on-boarding process for new board members
- To continue to pursue regional and organizational diversity on the board

**Respectfully Submitted,**

**Pleun Bouricius, *President, Conference Committee***

**Stacia Caplanson, *Director***

**Shana Dupont Garr, *Director***

**Jonathan Green, *Secretary***

**Gavin Kleespies, *Director***

**Katie MacDonald, *Director***

**Sonia Pacheco, *Director***

**Eric Peterson, *Director, Advocacy Committee***

**Mike Potaski, *Vice President, Regional Development Committee***

**Margo Shea, *Director, Communications Committee***

**Earl Taylor, *Treasurer, Finance and Strategic Development Committee***