

## DRAFT HSPV 606-001 Historic Site Management Fall 2021; Tuesdays 10:15am to 1:15pm, 31 August through 7 December Meyerson Hall B6

**Professor**: Laura C. Keim (Stutman), She/Her, Curator for Stenton, Curatorial Advisor for Historic Germantown.

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**Campus Office Hours**: **Tuesday afternoons, after class until 2:15**. I do not have my own private office. I will have access to **Meyerson B10**, which is a co-working space (so not private). I have key access to Aaron Wunsch's office (**Meyerson G16**) when available. I am always very happy to meet with you and look forward to opportunities to talk one-on-one; Zoom is super easy, and the phone works too. Because I am predictably on campus only on Tuesdays, it is best to **email me for an appointment, so we can confirm a time and set a location that will be conducive to conversation**. Touching base before or after class to set a time also works well.

## Student Teaching Assistant: Abbey Dyer

Preferred email: <u>adyer@upenn.edu</u> Secondary email: <u>abbey.k.dyer@gmail.com</u> Mobile: **757-969-9353** 

## **Course Description**:

Historic sites are typically preserved, publicly-presented, culturally significant places that hold the potential to render the past real and relatable and can offer informative and transformative experiences for visitors. Historic sites leverage connection to the past toward a broader understanding and context for the complexities of the present. We forge our individual and collective identities when we visit historic sites, ideally through stimulating, interactive, experiences that are educational and enjoyable. In the 21<sup>st</sup> century, historic sites are not valued as an inherent public good; they must work at keeping themselves relevant, to visitors and funders, and in good condition. An inherently place-driven and interdisciplinary pursuit, historic site management is situated at the intersection of museum studies, historic preservation, academic and public history, and material culture, which requires that its practitioners stand firmly in the present, with a deep understanding of the material past, and a strategic vision for a sustainable, useful future.

Focused through an interpretive lens this course grounds students in the development of historic sites in America, how they are structured and operate, and considers how they are evolving in the 21<sup>st</sup> century. The class offers an overview of the major activities of governing and managing a historic site including, planning and decision making for heritage sites, from individual buildings to landscapes. The course will take us on a journey to explore key concepts in site management and asks you to develop a relationship with a local historic site through assignments that are components of a General Operating Support Grant. Readings will offer historical and theoretical underpinnings for the work of historic site management; lectures will often bring speakers to address a topic or site case study, and field trips present a range of site types and operational cultures. The assignments will immerse you in a site of your choosing and ask

you to engage with it at a practical level. The course provides an introduction to the non-profit sector and the context of the legal and professional expectations for governance; the elements of forming a museum, strategic planning, the role of the CEO/Director, building an organization, structure and staffing; finance, operations, facilities management, fundraising, grant writing, business planning, special events, programs, communications, performance measurement and accreditation, marketing, public relations, and managing change, with an emphasis on ethical challenges and decision making. Topics to be examined in greater detail may include preservation and conservation policy, interpretation, community engagement, public memory and identity, tourism, and development strategies.

In the early weeks of the course, we will establish foundational understanding of historic site operations. As the semester progresses, we will concentrate on current issues in site interpretation such as interpreting inclusive histories, becoming operationally inclusive, and contemporary art at historic sites.

# **Course Objectives**:

- 1) To foster a familiarity with and build knowledge of historic sites and heritage practice how and why historic sites developed, what they mean, what they do, what one needs to know to manage, run, grow, and sustain them and their collections; how to engage with audiences, and how to fundraise.
- 2) To critically consider current issues in the historic site field including how to balance preservation and use and ways to build a site's relevance and human attachment to it in the present.
- 3) To develop basic understanding of material culture analysis, making meaning from places and things, and of the care and presentation of buildings, landscapes, and artifacts.
- 4) To introduce grant writing, developing key messages to make the case for a site -- core site management skills.
- 5) To further communication, research, and writing skills.

# **Field Trips:**

Field trips are a key way of learning about sites by experiencing them and talking with the people who manage them, as the location and circumstances for each site define what it is and how it operates.

**LOCAL** – during class time

- Stenton, lower Germantown
- Betsy Ross House/Elfreths Alley
- Pearl Buck House, Bucks County
- Mother Bethel AME Church/Christ Church Preservation Trust
- Hagley and Eleutherian Mills, Delaware

## **Speakers:**

- Sean Kelley, Eastern State Penitentiary Engaging in a Program of Civic Change in a Tourist Attraction
- Dennis Pickeral, Stenton Director -- Financial Management and Fundraising
- Jody Manning, Lecturer in History, Rowan University -- Historical Memory and Community at Historic Holocaust Sites of Trauma
- Sarah Pharaon, Consultant for Methodology and Practice, The International Coalition of Sites of Conscience and Senior Principal, Dialogic Consulting Empathy at Historic Sites, Shifting Hearts and Minds
- Monica O. Montgomery, Curator Community Engager DEI Consultant Professor -- Co-Founder Museum Hue Board Vice Chair Monument Lab Museum Thought Leader
- Ted Maust, Director, Elfreth's Alley Museum

#### **Assessment and Grading:**

Class attendance and participation (10%) Reading Analysis Responses (20%) Site Visit Analysis (20%) Material Culture Object Catalog and Analysis Papers (20%) Class project – General Operating Support Grant (20%) Presentation (10%) There will be **no final examination**.

## Attendance, Participation, and Class Conduct:

Please let me know if you will be missing class, late to class, or need to leave early. We will cover a lot of territory in every class, so your presence and participation are critical to your absorption of the material, and we will learn together through discussion. Classroom use of the internet is permitted when it enhances understanding of the topic of discussion and is shared. Non-class related use of the internet during class is prohibited. I expect you be attentive and courteous to staff during our site visits.

#### **Academic Integrity:**

The University of Pennsylvania's Code of Academic Integrity

https://next.catalog.upenn.edu/pennbook/code-of-academic-integrity is central to the ideals that underpin this course and academic life. You are expected to be independently familiar with the Code and to recognize that your work is originally your own and is a representation of your time and effort. Instances of academic dishonesty, cheating, or plagiarism will be referred to the Office of Student Conduct for adjudication. According to the Code, you may not submit any work you completed to fulfill another academic requirement without my prior permission.

### Writing:

Good writing is important—and writing quality will factor in the grading of every written assignment. Grades will reflect the content and persuasiveness of your writing, your willingness to advance new ideas, your grasp of the course's issues, as well as conforming to scholarly conventions and the mechanics and form of good writing (spelling, grammar, paragraph structure, and so on). Conventions of academic and professional writing are essential to successful professional work in Preservation. You will use standard forms of footnoting and clear bibliographic referencing to record the sources on which your work relies. All writing assignments must abide by the conventions of academic referencing, unless specifically directed otherwise. The *Chicago Manual of Style* is a useful guide to writing style and producing citations, all easily found online. For every assignment, pick a format and be consistent. Rampolla

## **Submission and Returning Papers:**

Readings and Semester writing assignments will be submitted digitally through CANVAS or by email if there are issues with CANVAS. I will not consider any written assignment late if it is in my email inbox or in canvas that same afternoon. I am an understanding and generally flexible person. If you do require an extension, please be in touch to determine a submission plan.

**Readings** will be posted weekly to CANVAS. Our Teaching Assistant and I will coordinate to be sure readings are available.

## Assignments:

## Weekly Reading Responses:

Write a brief, one-page, single-spaced response (about 600 words) to the week's readings. You can synthesize the texts to get yourself started. Some general questions (no need to answer them all) are prompts to get your thinking going):

- What are your overall reactions to these texts?
- Are there passages, concepts, or examples that stand out for you?
- Are there concepts or points here that might apply to the site you are studying?
- Did the reading shift your perspective or offer a new insight?
- How is the content supporting your understanding of historic site practice?
- How is this text valuable and why?
- What is the author's argument? Do you agree or disagree? What sorts of evidence or data are used to establish the argument?

As preparation for class discussion, **include several questions** (they can be in list form), which you can reference in class to help frame our class discussions. I will comment on these short responses and grade them each week.

## **DUE Monday at Midnight Every Week**

Choose a historic site to study and develop a relationship over the course of the semester. You are required to visit it at least once and to interact with its Executive Director (Zoom could prove a good way to set up that meeting). I recommend if you can also getting a feel for its programming, attending an event, whether in-person or virtual, and to familiarize yourself with its web content.

## Assignment 1: An Audit of Management Issues and Preservation/Interpretation Analysis:

Visit and Get to Know a Historic Site with which you are not already familiar. (Identify two to three top choices by week 4 – September 21st) For the purposes of our course, a historic site is a place-based non-profit organization with a mission to serve the public. The ICOMOS Charter definition of a cultural heritage site can help guide you in determining whether your organization of interest is indeed a historic site:

"Cultural Heritage Site refers to a locality, natural landscape, settlement area, architectural complex, archaeological site, or standing structure that is recognized and often legally protected as a place of historical and cultural significance."

-- The ICOMOS Charter for the Interpretation and Presentation of Cultural Heritage Sites

Your final project will be to write a General Operating Support Grant for this same site, so think about developing a relationship with the site over the course of the semester, hopefully visiting more than once to attend a program or special event. I have an old, printed guidebook that may be helpful in selecting sites and am also happy to make suggestions if you would like to talk about what is out there. I do not know every historic site in the Delaware Valley. "The Daily Antiquarian" on Facebook and Instagram posts historic places throughout the area and might be another way to stumble on something of interest to you. See the criteria for a site to qualify for a **PHMC General Operating Support Grant** as a guideline for thinking about a site you might like to work on (Can be outside of Pennsylvania.) https://www.phmc.pa.gov/Preservation/About/Documents/CHS fact sheet\_template.pdf. Also, set up a free account with GuideStar, <a href="https://www.guidestar.org/home.aspx">https://www.guidestar.org/home.aspx</a> where you can search for organizational IRS 990s to also get a sense for an organization. You can also find IRS 990s at <a href="https://foundationcenter.org/find-funding/990-finder">https://foundationcenter.org/find-funding/990-finder</a> -- click on "990 Finder." (Remember a site might not be found under its museum name. For example, Stenton does not have a 990, but The National Society of The Colonial Dames of America in the Commonwealth of Pennsylvania does.) **Visit your site** – **in person and digitally.** Investigate the Site's website, plan a visit which should include experiences of tours, programs attended, or perhaps exhibitions, depending on the format of your site. Get to know and analyze the site's physical and organizational structure. How easy is it to find? Arrival sequence? Visitor Flow? Signage? Condition of historic buildings and visitor facilities? Research the history of its founding, and its financial health. In a **1500 to 2000-word memo** conveying your "audit" (assessment) of conditions and issues facing the site. Include an "executive summary" (one or two paragraphs), a very brief history/description of the site (no more than 250 words), an account of how the site is experienced by visitors/users (physically and virtually), its interpretation, how it conveys its mission, and discussion of evident management issues. Does the site have a Strategic Plan it can share with you? Assume your audience is a boss or colleague to whom you are explaining the management issues of the site as a prelude to advising the site on management decisions. Consider the strengths, weaknesses, opportunities and threats to the site (SWOT).

You should contact and interview someone with management responsibility for the site (this is *strongly encouraged*, but not absolutely required as people will not always make themselves accessible on your schedule. Hence a Zoom meeting may work well). DO NOT UNDERESTIMATE THE POWER OF THE TELEPHONE. I suggest emailing first and then telephoning to follow up. For some Site Managers, a student poking around in their operations may feel uncomfortable. I am happy to be in touch with the Site Manager/Director if it helps you. The AAM "MAP Manual" (Museum Assessment Program Standards) may be a helpful resource. <u>https://www.aam-us.org/programs/ethics-standards-and-professional-practices/core-standards-for-museums/</u> See Handout with helpful questions to ask of your site. **DUE Friday, 22 October at Midnight in CANVAS.** 

Assignment 2: Object Interpretation Project -- Catalog and Interpret an Object (paper and presentation) Applying material culture methodology, write a "museum catalog entry" for an object in your site's collection or for an architectural or landscape feature. This 2-3 page report plus illustrations (photos or drawings) will include a description, measurements, materials, date or date range, place of origin (if known), maker (if known), classification (see a Nomenclature book or this website <a href="https://www.nomenclature.info/apropos-about.app?lang=en">https://www.nomenclature.info/apropos-about.app?lang=en</a>), provenance, condition, storage location, cultural significance (through context), relationship to other objects in yours or other collections (if any), monetary value (if known), and documentary photographs. Please note that the description should allow a person to identify your object from a line-up of similar object-specific "anatomy" to describe them. Research similar objects for comparison to access object-specific vocabulary for your object (we can discuss) and to create a context in which to assess the broader cultural importance of your object, its importance to your site, and relevance to its audience(s). If you email me drafts of the assignment, or even just the description, in advance of the due date, I will be happy to advise and comment.

# On the final day of class in December you will **present your object** and its cultural importance to the class along with your site.

These readings may be helpful in thinking about your object:

- Montgomery, "The Connoisseurship of Artifacts," in Schlereth, *Material Culture Studies in America*, chapter 8, 143-152.
- Fleming, "Artifact Study: A Proposed Model," in Schlereth, *Material Culture Studies in America*, chapter 10, 162-173.

See Material Culture and Points of Connoisseurship Handout.

## DUE Friday, 19 November at Midnight in CANVAS.

# Assignment 3: Write a PHMC General Operating Support Grant for the Historic Site (final

**project**) <u>http://www.phmc.state.pa.us/Portal/forms/Grants/gos\_app.pdf</u>. Grappling with the particulars of the application will demonstrate your understanding of many site management areas. I will refine this assignment as we get into the semester to make the grant writing exercise realistic but adaptable for our purposes.

DUE Friday, 17 December at Midnight in CANVAS.

Syllabus subject to changes per speaker scheduling and site availability. There may also be some adjustments to readings to include speakers' suggestions.

Topics / Schedule /Readings / Assignments due

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# Week 1 – 31 August – Come with interest and curiosity. Nothing DUE

Introduction to the Course – syllabus and expectations (mine and yours) Getting to know each other – index cards and introductions Defining Historic Site Management -- Types of Historic Sites International Definitions of Heritage and Heritage Practice Why and what we remember – heritage values shift over time "Why Old Places Matter" Antiquarianism and the seeds of Site Preservation. Things to connect to in finding the story of the past.

**OPTIONAL visit on your own time** – **Afro-futurism installation at Hatfield House, Fairmount Park** AUGUST 14-SEPTEMBER 19, 2021

ANCESTORS RETURNING AGAIN / THIS TIME ONLY TO THEMSELVES <a href="https://myphillypark.org/explore/parks/hatfield-house/hatfield-house-events/">https://myphillypark.org/explore/parks/hatfield-house/hatfield-house-events/</a>

## Week 2 – 7 September

History of Historic Sites - we are part of a continuum

Young, *Historic House Museums in the US and UK*, chapter 6 (Social History HHMs) Alexander and Alexander, *Museums in Motion*, chapters 5. West, *Domesticating History*, chapters 1 & 4. Nash, "Behind the Velvet Curtain," PHMB, Jan 1990, 3-36.

# Week 3 – 14 September

Relevance and Reimagining

- AASLH History Relevance Statement <u>https://www.historyrelevance.com/</u> Almost identical language appears as the brief chapter 9 in *Reimagining Historic House Museums*.
- Nina Simon, *Art of Relevance*. Pick several of her vignettes that appeals to you. FREE: <u>http://www.artofrelevance.org/read-online/</u>
- Max A van Balgooy, "Imagining a Reimagining Process for House Museums," Reimaging Historic House Museums, chapter 1, 7-18.
- <u>"The Inclusive Historian's Handbook," an internet resource from AASLH and NCPH,</u> released late August 2019. Familiarize yourself broadly with this site. <u>https://inclusivehistorian.com/</u>

# Week 4 – 21 September – Winterthur Program with Laura Johnson 10:00 start time

# Shirt Tales: The Global History of an Early American Indigenous Trade Garment

In the 17th and 18th-century, indigenous people chose to acquire shirts more than any other single item of clothing offered them in exchange for furs, deerskins, and other goods. Academic discussions of early American trade between colonizers and indigenous residents often overlook these humble items in favor of gold-trimmed coats or scarlet woolens. Laura Johnson, curator of textiles, examines a single type of garment, from its origins in European flax fields to its indigenous use. Trading accounts, archaeological records, and rare survivals complement prints, paintings, and written descriptions, allowing a close examination of its construction, trade, and sartorial meaning.

• Prown, "The Truth of Material Culture: History or Fiction?," American Artifacts, 11-27.

Non-profit management and status, organizational structure Leadership, Mission, Governance and Board Relations

- Drucker, Managing the Nonprofit Organization, Part Four, 145-169.
- Legutko and Klingler, *Toolkit* Volume 1, chapters 3 & 6.
- Donna Harris, "The Essential Role of Boards in Reimaging House Museums" in Turino and van Balgooy, chapter 4.

Email me (we can also set up a time to discuss) 2-3 sites you might like to visit and research for your **Site Audit Assignment, Object Study and Analysis,** and the **Grant** along with a basic statement of your interest and whether the site would qualify for General Operating Finds from the PHMC (even if outside of PA). For our exercise the site should be in the Delaware Valley and easily accessible to you; being in Pennsylvania is not a requirement. Think about a place or kind of place/topic that speaks to you in some way. This is your chance to delve into a place or type of place of interest and think about its meaning and relevance over the course of the semester. You are assessing a non-profit organization and its operations, not just the physical infrastructure of the site.

# Week 5 – 28 September

**Financial Resource Management and Development,** Budgeting, Grant Writing, Grant Reporting, IRS 990, Relationships with audience, stakeholders, and donors. Schmoozing and Communications.

# **Dennis Pickeral**

- Legutko and Klinger. *Toolkit*, Volume 2, chapters 1, 2, & 4.
- Simek, Jamie. *Fundraising Basics for Local History Organizations*. AASLH Technical Leaflet #283.
- Giridharadas, "Generosity and Justice" chapter 6 in Winners Take All.

Week 6 – 5 October – Mid Atlantic Association of Museums Conference Session – 10:00 am start time

Laura as conference panelist presenting on Inequality in Bronze – Stenton's Dinah Memorial Project

Legutko and Klingler, *Toolkit*, Volume 4, chapters 4, 6.

McLean, Kathleen, "Whose Questions, Whose Conversations," in Adair, Filene & Koloski (eds.) Letting Go?, 69-79.

Weil, "New Words, Familiar Music," *Making Museums Matter*, chapter 6, 75-90. Bailey, Dina,

## Week 8 – 19 October

Interpretation and Material Culture – The song(s) a site sings best or needs to sing, how to make the past come alive. Identifying core flexible themes to underpin site presentation, relating spaces, objects, and people to convey the past. Stenton's Dinah Memorial Project. FIELD TRIP -- Stenton

Scan Interpretive Plan for Stenton on the website <u>www.stenton.org</u> for structure. Tilden, "Principles of Interpretation," Chapter 1, 3-10.

Keim, "Why Furnishings Matter," in Turino, Kenneth and Max Van Balgooy (eds.), *Reimagining Historic House Museums: New Approaches and Proven Solutions*. Lanham, MD: Rowman and Littlefield, Oct 2019. (pending) Bloom, chapter 8 – "Why Pleasure Matters."

Vagnone and Ryan, Anarchists' Guide to Historic House Museums, selections.

## Week 9 – 26 October

Audiences, Programs, Events, Evaluation, Accessibility and Hospitality Marketing and Communications, social media Audience and Community Evaluation Sean Kelley Engaging in a Program of Civic Change in a Tourist Attraction Museums Are Not Neutral

Legutko and Klingler, *Toolkit*, Volume 4, chapters 1, 2. Readings: more to come from Beth.

Week 10 – 2 November FIELD TRIP Pearl S. Buck House 520 Dublin Road Perkasie, PA 18944 10:30 Arrival; 10:45 Traditional Tour; Bring your own lunch; 12:45 Taking Action Tour; 2:15 Departure https://pearlsbuck.org/

## Week 11 – 9 November

Site Management Practice for Social change/Civic Action Sarah Pharaon – International Coalition of Sites of Conscience, Tours for Social Change; Facilitation

Kaufman, "Putting Intangible Heritage in its Places," PDF. Sarah Pharaon, Sally Roesch Wagner, Barbara Lau, and Maria Jose Bolana Caballero, "Safe Containers for Dangerous Memories," *The Pubic Historian*, Vol 37, No. 2 (May 2015), 61-72.

FIELD TRIP - 9:00 Betsy Ross House / 10:20 Christ Church Preservation Trust

Kimberly Staub, Sandra Mackenzie Lloyd, and Betsy – The Elements of a Good Story, First-person interpretation; The Blessings and Curses of Being a Major Tourist Attraction and Small Site Barbara Hogue, Carol Smith – Neighborhood House, Theater, Tourism, Archives, Preservation, Congregation

Ann E. Birney and Joyce M. Thierer, *Performing History*, preface and chapter 1. Lloyd, Sandra Mackenzie, *Patriots, Pirates, Heroes and Spies*. Historic Philadelphia, Inc., 2008. Rather than the book, we will read some PDFs of scripts by Sandy and her "Become a Storyteller," also a PDF.

## Week 12 – 16 November

Collective Memory and Trauma at Holocaust Historic Sites Jody Manning

Dwork, Deborah and Robert Jan Van Pelt, *Auschwitz, 1270 to the Present*, Epilogue. Rose, *Interpreting Difficult History at Museums and Historic Sites*, chapters 2 & 4.

# 23 November – NO CLASS (THURSDAY SCHEDULE)

# Week 13 – 30 November

## Week 14 -- 7 December --

**Presentations** – Present your site and your object to the class with PowerPoint images. To save time load some of your information into the slides, which will allow your images to do some of the talking for you. Share the place; give a sense of its physicality, history, organizational structure, and mission. Analyze its position, strategic vision, and financial health and viability.

## Websites and Organizations to Know and Follow:

AAM – American Alliance of Museums, <u>https://www.aam-us.org/</u>

• Center for the Future of Museums

AASLH – American Association for State and Local History, https://aaslh.org/

• History Relevance Campaign

NCPH – National Council on Public History, http://ncph.org/

• Value of History Statement,

MAAM - Mid-Atlantic Association of Museums, http://www.midatlanticmuseums.org/

International Coalition of Sites of Conscience, https://www.sitesofconscience.org/en/home/

GPCA -- Greater Philadelphia Cultural Alliance, https://www.philaculture.org/

Guide Star, a venue for looking up non-profit 990 forms, <u>https://www.guidestar.org/home.aspx</u> <u>https://trust.guidestar.org/understanding-the-irs-form-990</u>

Inclusive Historian's Handbook, https://inclusivehistorian.com/

PHMC – Pennsylvania Historical and Museum Commission,

https://www.phmc.pa.gov/Pages/default.aspx

 General Operating Support Grant, http://www.phmc.state.pa.us/Portal/forms/Grants/gos\_app.pdf

PCAH – Pew Center for Arts and Heritage, <u>https://www.pewcenterarts.org/</u>

NPS - National Park Service, https://www.nps.gov/subjects/hfc/index.htm

National Trust UK, <u>https://www.nationaltrust.org.uk/</u> and The Royal Oak Foundation, <u>https://www.royal-oak.org/</u> ACHS -- Association of Critical Heritage Studies, <u>http://www.criticalheritagestudies.org/</u> Board Source, <u>https://boardsource.org/</u> Alliance for Non-Profits, <u>http://alliancefornonprofits.org/</u> La Salle University Non-Profit Center, <u>https://www.lasallenonprofitcenter.org/</u> National Council of Nonprofits, <u>https://www.councilofnonprofits.org/</u> The Slave Dwelling Project, <u>https://slavedwellingproject.org/</u>

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Anderson, Gail. *Mission Matters: Relevance and Museums in the 21<sup>st</sup> Century*. Lanham, MD: Rowman & Littlefield, 2019.

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Beatty, Bob, "The Deaccessioning Debate in Museums," *Hyperallergic Newsletter*, August 2, 2018. <u>https://hyperallergic.com/453416/the-deaccessioning-debate-in-museums/</u> Birney, Ann E. and Joyce M. Thierer. *Performing History: How to Research, Write, Act and Coach Historical Performances.* Lanham, MD: Rowman and Littlefield, 2018.

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Cadou, Carol Borchert with Luke J. Pecoraro and Thomas A. Reinhart. *Stewards of Memory: The Past, Present, and Future of Historic Preservation at George Washington's Mount Vernon*. Charlottesville and London: University of Virginia Press, 2018.

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Fleming, E. McClung. "Artifact Study: a proposed model." *Winterthur Portfolio* 9 (1974): 153-173. (also in Schlereth, see below.)

Foner, Eric. Who Owns History?: Rethinking the Past in a Changing World, 2003.

Gallas, Kristin L. and James DeWolf Perry (eds.), *Interpreting Slavery and Museums and Historic Sites*. New york: Rowman and Littlefield, 2015.

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