

## NARRATIVE

### NATURE OF THE REQUEST

The Thomas Jefferson Foundation (TJF), which owns and operates Monticello, Jefferson's plantation home and UNESCO World Heritage Site, seeks a \$75,000 Historic Places Planning Grant from the National Endowment for the Humanities (NEH) to support the development of a new, innovative interpretative plan for the visitor experience at Monticello to mark the nation's 250<sup>th</sup> anniversary and the bicentennial of Thomas Jefferson's death in 2026.

Multiple studies have shown that visitation to historic sites and museums is declining nationally. After decades of stable attendance, Monticello has experienced a measurable decrease in visitation over the last few years. The attendance decline for Monticello and our peer institutions is a symptom indicating that we have not kept pace with making founding-era history relevant to newer generations.

**In advance of the semiquincentennial in 2026, Monticello will create a plan for the core visitor experience that will be reflective of – and inspirational to – our modern, pluralistic society.** The plan will establish desired, measureable cognitive and emotional outcomes for the entire Monticello experience. These outcomes will be supported by the redesign of six exhibition galleries at Monticello's David M. Rubenstein Visitor Center and on the historic mountaintop, and up to three new guided and self-guided tours for the more than 400,000 guests who visit annually.

To illuminate the relevancy of Monticello to those who find it hard to see their histories reflected in the founding era, we will center the new visitor experience on the two universal themes set out in the Declaration of Independence – **equality and freedom.**

Jefferson made it his life's work to advance the promise of the Declaration of Independence, realizing a nation that was not only conceived in liberty, but one that would become more democratic through the activism and engagement of its citizens. Despite the initial exclusion of women and people of color – and the Founders' failure to resolve the paradox of slavery in an age of liberty – the United States remains the longest experiment in representative government in the modern world. The fundamental principles embedded in the Declaration – liberty, equality, and self-government – still bind us together as Americans, and provide a rallying cry for freedom movements within our country and around the globe. Monticello is a quintessential site of American history and memory, and the lives of all of Monticello's inhabitants, free and enslaved, provide powerful personal stories to more fully explicate these ideals.

As an exceptionally ambitious project that will impact nearly five million visitors over the next decade, we request \$75,000 from the NEH to fund: 1) the convening of an expert advisory group, comprised of leading scholars and public history professionals; 2) three benchmarking trips for TJF interpretation leaders to cultural organizations around the country; 3) expanding the role of an existing staff member to facilitate implementation of the planning grant; 4) a visitor experience audit; and 5) the development of a logic model to assess effectiveness of the reimagined visitor experience.

Monticello is a microcosm of the American experience. As one of our country's most iconic historic sites, we are positioned to fulfill the NEH's recently unveiled **area of interest related to the commemoration of the nation's 250<sup>th</sup> anniversary.** Drawing on decades of research and scholarship, including generous planning and implementation grants from the NEH, the new visitor experience will share the themes of equality and freedom in meaningful ways with millions of Americans through new exhibitions and live historical interpretation.

## HUMANITIES CONTENT

The master plan for our core visitor experience will center on the ideas of one of Jefferson's greatest legacies: **promises of freedom and equality inherent in the Declaration of Independence**. We will use Jefferson's life and plantation as lenses to explore the tension between these two ideals, and to examine the lasting political and cultural impact of the Declaration of Independence. Given that the Declaration of Independence remains an important cultural and existential component of American identity, it will serve as the central thematic element in our programs and exhibitions.

Jefferson described the Declaration of Independence as "an expression of the American mind." His words and ideals have inspired Americans throughout our history. Elizabeth Cady Stanton re-wrote them at Seneca Falls to call attention to the rights of women. Frederick Douglass called them "saving principles" in his struggle to eradicate slavery. Abraham Lincoln invoked them at Gettysburg to rally his countrymen around the idea of "a new birth of freedom." At the National Mall in 1963, Martin Luther King Jr. called the Declaration a "promissory note," and urged the nation to honor this "sacred obligation."

At Monticello, we will reveal the influences that shaped our nation through Jefferson's life story. His grounding in Enlightenment thought and his unshakeable faith in human reason inspired his trust in the capacity of American citizens to govern themselves. Throughout his life, these values shaped his championing of democratic values, individual liberties, and the importance of public education. His vision of self-governance has survived as a bedrock of American democracy. As we reimagine our exhibitions and programs, Monticello's staff will tell the story of that vision beyond Monticello's borders and beyond Jefferson's lifetime, to show the enduring influence of "these truths."

Monticello is Jefferson's three-dimensional autobiography. It's architecture, collections, gardens, and agricultural landscape illustrate the ideals, realities, and contradictions present at the founding of the United States and embodied in the Declaration of Independence. The home and its collections reflect Jefferson's idealistic vision to "improve the taste of my countrymen" through art and architecture, and his commitment to scientific discovery, reason, and the spread and sharing of knowledge. The ideas of the Declaration and the material environment of Monticello reflect Jefferson's pragmatic optimism.

But Monticello also reveals Jefferson's incongruity and inconsistencies. Writing in the *New York Times* in January 2012 to review *Slavery at Jefferson's Monticello: The Paradox of Liberty* – the traveling exhibition jointly produced by TJF and the National Museum of African American History and Culture – Edward Rothstein noted that, "Jefferson didn't just embrace the nation's ideals; he gave voice to our conception of 'life, liberty, and the pursuit of happiness.' What does it mean that such a man held slaves... These are not just biographical questions; they are national ones." The stories of the enslaved community written into this landscape expose the contradictions of Thomas Jefferson as American contradictions, and the struggles for freedom and equality of Monticello's enslaved families as an American story – one that must be properly centered into the narrative of our early history.

Even as Jefferson articulated a vision for a country based around the unalienable rights of life, liberty, and the pursuit of happiness, the stories of those he enslaved at Monticello reveal the limitations of Jefferson's vision and the stark realities for those who were excluded from it, including his own children with Sally Hemings. The stories of descendants of Monticello's enslaved community, collected through the *Getting Word Oral History Project*, carry the history forward in relating the struggles and triumphs of more than seven generations to fulfill the promises of the Declaration.

The completion of TJF's five-year-long Mountaintop Project – a \$35 million restoration of the house and mountaintop landscape – has contributed to our efforts to tell holistic story of life at Monticello. During

this project, we restored two original buildings along Mulberry Row (the main street of the Monticello plantation) and recreated two additional buildings. We have also restored and incorporated groundbreaking exhibits in Monticello's South Wing, including the room where Sally Hemings and her children likely lived. The results of the Mountaintop Project have fundamentally changed the visitor experience, making stories of slavery manifest in the landscape. As we seek to redesign our core guest experience, we wish to ensure that it incorporates an honest, inclusive, and complicated depiction of life at Monticello – one that incorporates the voices of the enslaved community.

### Humanities Scholarship

Danielle Allen's *Our Declaration: A Reading of the Declaration of Independence in Defense of Equality* (2014) provides a framework for reading the Declaration as living, civic document. David Armitage has made a powerful case for the reception and appropriation of the Declaration beyond the United States in his global history, a subject addressed in our NEH-funded exhibition, the *Boisterous Sea of Liberty* (2009). We will draw upon these works, and the expertise of other leading scholars, as we re-conceive our exhibition on the Declaration as a story of the realization of freedom and equality from Jefferson's perspective and beyond to our own.

Looking beyond the Declaration, we will reference work on Jefferson's contributions to ideas of religious liberty in the Statute of Virginia for Religious Freedom. John Ragosta's *Religious Freedom: Jefferson's Legacy, America's Creed* (2013) examines the growth of the idea of religious freedom, a distinctly minority view in the 1780s, into a cornerstone concept, though much debated, of American civic life today. Ragosta is currently on staff at TJF's Robert H. Smith International Center for Jefferson Studies. Thomas Jefferson Foundation Professor Emeritus Peter Onuf and Charles Warren Professor of American Legal History at Harvard Law School Annette Gordon-Reed also have written thoughtfully and provocatively of Jefferson's religious views in their collaborative work *Most Blessed of the Patriarchs: Thomas Jefferson and the Empire of the Imagination* (2016). A much broader body of scholarship on church and state will also inform our planning, including both exhibitions and publications by Peter Manseau, Lilly Endowment Curator of American Religious History at the National Museum of American History, the Smithsonian.

Our own visitor research indicates that people come to Monticello with a keen interest in, but not a great deal of knowledge about, Jefferson's historical legacy. Our new interpretative plan will place the stories of Monticello and of the enduring and transforming ideas of the Declaration into a longer chronological and thematic context, making the case for an American identity rooted in the ideas of freedom and equality. The case for understanding the ideas of civic nationalism or liberal nationalism have been made forcefully by Jill Lepore both in her survey text *These Truths: A History of the United States* (2018) and in her shorter set of essays *This America: The Case for the Nation* (2019). The Declaration of Independence and the ideas inherent within it – debated, demanded, denied, appropriated, reimagined, redefined, and invoked – remain at the center of this notion of American identity. Lepore's work can be joined to that of Jon Meacham, Pulitzer Prize-winning historian and Chairman of the Thomas Jefferson Foundation, in his work, *The Soul of America* (2018), which makes the case for telling powerful stories about how ideas animate the American experiment. University of Virginia historian Alan Taylor's works will also prove influential, particularly *American Revolutions* (2016), which presents a survey of the Revolutionary period, with a goal of presenting a more pluralistic and international perspective.

More specific works on Jefferson and Monticello abound. John B. Boles's recent work, *Jefferson: Architect of American Liberty* (2017) and Jon Meacham's *Thomas Jefferson: The Art of Power* (2013) will provide modern, well-referenced biographies. Meacham in particular makes a forceful argument for

Jefferson as someone who not only articulated ideas through the most powerful medium of his age, but understood the political calculus to achieve his desired policy ends as president.

Scholarship concentrating on Jefferson, race, and slavery influences our understanding of these topics. We will turn to three important works published by TJF – *Slavery at Monticello* (1996), *Free Some Day* (2000), and *Those Who Labor for My Happiness: Slavery at Thomas Jefferson's Monticello* (2012), all by TJF's Shannon Senior Historian Emeritus Lucia Stanton. James Horton's *Slavery and Public History: The Tough Stuff of American Memory* (2006) contains relevant essays by noted scholars: "Coming to Terms with Slavery in Twenty-First Century America" by Ira Berlin; "If You Don't Tell It Like It Was, It Can Never Be As It Ought to Be" by David Blight; "Slavery in American History: An Uncomfortable National Dialogue" by James Horton; and eight other works. Also critical is Annette Gordon-Reed's *The Hemingses of Monticello* (2009), winner of the National Book Award and Pulitzer Prize for non-fiction. Her book describes the lives and relationships of the extensive Hemings family, who occupied key positions at Monticello. Ibram X. Kendi's National Book Award winner, *Stamped from the Beginning: The Definitive History of Racist Ideas in America* (2016), contains an extensive consideration of Jefferson's views on race and how they influenced the development of racist ideas in the United States.

In addition to these works, the consultation of a Monticello's Academic Advisory Board will inform our work. Members of this board include leading historians and scholars Ed Ayers, Danielle Allen, Annette Gordon Reed, Christa Dierksheide, and Peter Onuf.

Finally, Monticello will make use of the scholarly resources generated through decades of onsite research. Through Monticello's Robert H. Smith International Center for Jefferson Studies (ICJS), we have access to decades of archeological research and the catalog of Digital Archeological Archive of Comparative Slavery. ICJS also houses the *Getting Word Oral History Project*, which documented the stories the descendants of Monticello's enslaved community over the last 25 years, and the Papers of Thomas Jefferson: Retirement Series, which publishes the definitive edition of Thomas Jefferson's letters and papers for the period from 1809 to 1826.

## PROJECT FORMATS

This process to create the master interpretative plan will have five main components:

- an expert advisory panel
- three benchmarking trips
- audience experience audit
- logic model development, and
- writing and editing of the plan.

See project history for other critical parts of planning and research accomplished in the past several years.

### Expert Advisory Panel

For decades, Monticello has utilized internal and external expert advisory groups to advance our scholarship and interpretation. Prior to the opening of widely publicized *The Life of Sally Hemings* exhibit in the summer of 2018, members of Monticello's Advisory Committee for African American Affairs were instrumental in offering guidance on the exhibit's sensitive content and thoughtful design. To plan for the reimagined visitor experience, we will convene an expert panel to offer advice and feedback on specific issues. The panel will be a combination of scholars, including Ed Ayers, Annette Gordon-Reed, and Peter Onuf, as well as public historians, including Melanie Adams (Director of the Smithsonian Anacostia

Museum), Linda Norris (International Coalition of Sites of Conscience), and Richard Rabinowitz (American History Workshop).

We will convene the group for two days in the summer of 2020 to refine interpretive themes that we will use for the new visitor experience. We will discuss our initial thoughts on ideas related to freedom and equality and draw from their nuanced humanities perspectives. We will also look for insights into how to translate the humanities themes into a compelling experience for a general audience. At the end of the panel's meeting, we will have developed and refined the main interpretive themes to guide the visitor experience. We will also ask panel members to read and comment on our master plan in the spring of 2021.

### Benchmarking Trips

To achieve our primary goal of our reimagined visitor experience – to make the core visitor experience at Monticello reflective of, and inspirational to, our modern pluralistic society – we must stretch our thinking and openly reevaluate how we have “always” developed exhibitions and programming. Up to seven Monticello staff members will take benchmarking trips together to see sites that are embracing evocative place-based storytelling for our target audiences – particularly families with school-age children and younger millennials.

The visits will provide us with additional examples of high-quality scholarship in addition to new ways to connect our intended audiences to history. Several sites – notably the Owen-Thomas House & Slave Quarters, the Tenement Museum, Phillipsburg Manor, and Angel Island – have translated complex historical topics and concepts into innovative exhibits and tours.

Specifically, we intend to visit and benchmark museums in the following areas:

- 1) Charleston, South Carolina / Savannah, Georgia
  - Including McLeod Plantation, Historic Charleston Foundation, Owens-Thomas House & Slave Quarters, and Drayton Hall
- 2) Hudson River Valley / New York City
  - Including Kykuit (the Rockefeller Estate), Phillipsburg Manor, the Statue of Liberty, National September 11 Memorial and Museum, and the Tenement Museum
- 3) Monterey / San Francisco
  - Including Santa Cruz Museum of Art & History, Monterey Bay Aquarium (for visitor flow and amenities), Angel Island, and Alcatraz

Beyond providing examples of scholarship and methodology, the benchmarking trips will strengthen inter-departmental relationships, fostering inspiration and the development of new ideas and approaches. As with many institutions, the Education/Interpretation department and the Curatorial department have worked somewhat independently of one another. At Monticello, cross-departmental partnerships have thrived in recent years, notably through the development and implementation of the recent *The Life of Sally Hemings*. Creating a strong inter-departmental project team is critical for reinventing the visitor experience and for enhancing a long-term culture of collaboration at Monticello.

### Audience Experience Audit

For decades, Monticello has been a leader in bringing substantive humanities scholarship into exhibitions and live historical interpretation, as evidenced by nearly twenty competitive federal grants and praise from museum critics writing for major media outlets such as the *New York Times* and *Washington Post*.

To attract new audiences, however, Monticello must now dedicate resources to taking an unvarnished look at the logistics of the current visitor model. We have built strong bridges between our guests' previous subject knowledge and the rich content we can share onsite and online. In preparation for the nation's 250<sup>th</sup> anniversary, we need to allow even greater access to the substantial content Monticello has developed.

Through recent evaluation work, we have learned about visitation barriers faced by our potential audiences. The completion of the visitor experience audit will help us address two significant barriers: a perception that visiting Monticello is "difficult" and that "Monticello is not for people like me." The vendors who perform the audit will examine the entire Monticello visit from the perspective of a guest with no prior knowledge of our operations – a valuable external perspective. Their report will inform us about how and where guests feel lost, confused, overwhelmed, or unwelcomed. As we prepare for 2026, we want to know what experience elements work well for our visitors, and what can be improved. We will only succeed in meeting our learning outcomes after we ensure guests' basic needs are met.

We have prepared a statement of work to select a vendor for this part of the project. (See attachment 6 Additional Information.) The deliverable requested is a comprehensive report with detailed observations on the entire visitor experience, including ideas for immediate implementation as well as long term solutions. For any story telling ideas, including exhibits or technology, it will include a rough estimate of the cost to implement. A sample of vendors who perform this type of work and from whom we will solicit proposals include PGAV, BRC Entertainment Arts, Design Island, Mousetrappe, and Falcon's Creative Group.

### Logic Model Workshop – Measuring Outcomes

We will conduct a two-day workshop with Conny Graft, a research and evaluation expert, to synthesize additional information we have gathered through the planning grant and turn this data into a logic model for the reimagined visitor experience. The logic model will provide staff with strategies for target audiences, indicators and tools to measure success, and anticipated outcomes for new experiences. A logic model is a tool that presents the shared relationships among the resources, activities, outputs, outcomes, and impact for a program. It depicts the relationship between your program's activities and its intended effects. We have worked well with Ms. Graft in the past to refine outcomes upon which to build successful programs.

### Contents of the Plan

At the end of the project, we will have a detailed interpretative master plan that will allow us to seek funding for implementation. The project team will work together to craft a plan with the following sections:

#### **Section 1: Analysis of current and potential audiences**

We will include information about demographics, needs, and interests of likely potential visitors, and an assessment of perceived barriers to visiting Monticello. We will also include some evaluation we are currently undertaking through support from the Peter G. Peterson Foundation about potential guests' understanding of Thomas Jefferson, Monticello, and the Declaration of Independence prior to their visit. This section will also include potential visitor case studies to help the project team visualize the result of our work.

#### **Section 2: Fleshed out interpretive themes based on the ideas of freedom and equality**

This section will have several carefully crafted interpretive themes based on the broad ideas of freedom and equality and will guide our work for the entire visitor experience.



### **Section 3: Logic model (including outcomes and indicators)**

Throughout this section, we will identify desired outcomes for our intended audiences. The outcomes will include how we expect our new visitor experience to produce changes in knowledge, emotions, and actions for our intended audiences.

### **Section 4: Methods – Exhibitions, Pathways, and Tours**

This section, which we expect to be the longest of the report, will give the plans for each of the exhibition galleries and guided or self-guided tours. The plan for each exhibit/tour will include its main topic, how the exhibit/tour will help meet the outcomes identified in the logic model, how the exhibit/tour connects to all other interpretive elements on site, and key historical artifacts or images that will be used. We will also identify ways that we can use visitor pathways and ancillary spaces to convey our interpretive themes.

### **Section 5: Infrastructure Recommendations**

The visitor experience audit will indicate to us any needed infrastructure projects that need to be implemented in conjunction with the new exhibits. We will especially consider how infrastructure can help alleviate accessibility barriers of our intended audience.

### **Section 6: Formative and Summative Evaluation Plans**

This section will include details on how TJF staff will evaluate the development of the new exhibits and tours, including prototypes and mockups. These evaluation plans are especially important to determine if we are meeting our goal to build a visitor experience that is reflective of – and inspirational to – our modern, pluralistic society.

### **Section 7: Costs and Staffing**

The master plan will include a section about expected costs of each exhibit and tour. It will also detail how we plan to raise the funds for each part of the new visitor experience. We will also identify the staffing positions needed to complete the work.

### **Section 8: Project Timeline**

We will make our project timeline nuanced, noting key project deadlines. Our expected opening for the new visitor experience spaces will be the weekend of April 12-13, 2025 – Jefferson’s 282<sup>nd</sup> birthday.

### **Section 9: Post-2026 Analysis**

Our experience with past anniversaries, including the Bicentennial in 1976 and the 250<sup>th</sup> anniversary of Jefferson’s birth in 1993, indicates that we will have a spike in visitation during the celebrations, followed by a slight decline immediately following the anniversary. This master plan will provide a sketch of how the projects we implement for 2026 will be stepping stones to maintain sustainable attendance following the anniversary.

## **PROJECT RESOURCES**

After the completion of our five-year Mountaintop Project, TJF has laid the groundwork for an ambitious rethinking of the core guest experience at Monticello. As we look ahead to what Monticello will be in 2026, we have the advantage of a myriad of resources and the multidisciplinary scholarly work of several decades, much of which has been funded through prior NEH grants. Reimagining the core visitor experience represents the latest chapter in our effort to make the stories of Monticello come alive, and to bring the history of this iconic forward into relevant dialogues of national and global significance.

## House & Collections

Jefferson called Monticello his “essay in architecture.” The house itself represents Monticello’s greatest resource. A National Historic Landmark, Monticello remains the only presidential residence in the United States on the United Nations World Heritage List. TJF also owns a substantial curatorial collection, including decorative arts, sculpture, painting, scientific instruments, and books, as well as over 750,000 archeological and architectural artifacts.

## The David M. Rubenstein Visitor Center

The David M. Rubenstein Visitor Center and Smith Education Center serves as the 21st-century gateway to the Monticello house and plantation, with five dedicated spaces for exhibits and a visitor film. Opened in 2009, these spaces will be transformed for the new visitor experience.

## Jefferson Library and International Center for Jefferson Studies

To support its scholarly outreach, TJF opened the Jefferson Library in 2002, the first presidential library devoted to a founding father. The 15,500 square-foot facility is a portal to information on Jefferson and Monticello, and includes collections of books, journals, videos, photographs, and maps. The Jefferson Library also houses *The Papers of Thomas Jefferson: Retirement Series*, which produces the definitive volumes of Jefferson’s writings during his retirement period.

## Archaeology

Extensive excavations have taken place since the 1970s and has formed the bedrock of every restoration project undertaken on the mountaintop. Today, the Department of Archaeology at Monticello directs the Digital Archaeological Archive of Comparative Slavery (DAACS), an internet-available database containing archaeological data from Colonial and Ante-Bellum sites across the Chesapeake, Carolinas, and Caribbean. Since 2002 DAACS has received several grants from NEH to continue its important scholarship.

## Getting Word Oral History Project

The ongoing *Getting Word Oral History Project* ([www.monticello.org/gettingword](http://www.monticello.org/gettingword)), begun in 1993, also informs interpretive content on and off the mountain. This project locates the descendants of Monticello’s enslaved families and records their oral histories which are supplemented with research in newspapers, private papers, and public records. The *Getting Word* archive includes stories spanning seven generations, which have informed our understanding of life at Monticello two hundred years ago. It represents the most comprehensive oral history archive on slavery outside of the WPA’s Slave Narratives Collection.

## PROJECT HISTORY

### The Mountaintop Project (2013-2018)

The physical restoration of the historic mountaintop was the critical first step in reimagining the visitor experience. In 2013, Monticello launched the Mountaintop Project, a multi-year initiative to reveal Monticello as Jefferson knew it and tell the stories of the people – enslaved and free – who lived and worked on the 5,000-acre plantation. As always, the process began with detailed analysis of Jefferson’s extensive documentary records, and with archaeological and architectural studies of the buildings and landscapes involved.

Through this \$35 million project, we recreated or restored 30 spaces in the house and along Mulberry Row. The second and third floors of the home – the primary residence of Thomas Jefferson’s family –



were fully restored and opened to the public for the first time. Outside of the main house we realigned Mulberry Row, the main street of the Monticello plantation, to its original plan, and reestablished the Kitchen Road, the main functional and visual link between the house and the plantation. Two lost slave structures along Mulberry Row were re-created and opened to the public in 2015: building *l*, a storehouse for iron where enslaved men forged nails, and building *t*, a slave quarter inhabited by members of the Hemings family. We restored two surviving Jefferson-era structures along Mulberry Row: the stone stable at the eastern terminus, and the 1770s “workmen’s house,” which has been interpreted a textile workshop dependent on slave labor. The remainder of the 20 structures that once flanked Mulberry Row have been digitally re-created and made accessible to our onsite and online visitors through an app. In 2018, TJF completed the restoration and interpretation of the remaining rooms in Monticello’s South Wing – including a dairy, an accompanying exhibition on the *Getting Word Oral History Project*, a slave quarter in which Sally Hemings and her children lived, and the South Pavilion, the oldest structure on the mountaintop and the first residence of Thomas Jefferson and his wife Martha Wayles Skelton Jefferson following their marriage in 1772. The Mountaintop Project also included critical infrastructure upgrades to Geothermal, HVAC, electrical, water and sewer systems on the property. The project reflects TJF’s longstanding commitment to immersing visitors in an honest, complicated, and inclusive portrayal of American history.

#### Thomas Jefferson Foundation Strategic Plan (2017-2021)

As the Mountaintop Project concluded, the TJF Board of Trustees identified the next steps in leading up to what we believe will be a watershed moment in American history, the celebration of the 250<sup>th</sup> anniversary of the country’s founding. This new strategic plan (see Additional Information attachment) has five goals:

1. Position Monticello for the 250<sup>th</sup> anniversary of our Republic
2. Convene conversations of national impact and global significance
3. Explore enduring issues of freedom and slavery
4. Ensure the inclusion of multiple perspectives
5. Restore farming to Monticello

This plan is the backbone for the work leading up to the reimagined visitor experience that we will launch in advance of the 2026 anniversary. To date, we have formed an internal staff committee to generate ideas for the 250<sup>th</sup> commemoration. That committee also recommended a timeline that included applying for planning funds in 2019/2020 and implementation grants in 2021/2022.

#### Monticello Audience Studies (2019)

As we prepare for the 250<sup>th</sup>, we realized we needed to understand better both our current and potential audiences. To this end, we engaged three independent research firms to provide reports and analysis:

Coherency – a marketing insights agency – was charged with helping Monticello re-energize its brand, making it relevant and resonant among new potential visitors.

IMPACTS Research & Development – a data and technology company – provided an extensive data set (n=124,000) with analysis on how the most likely visitors to Monticello think and behave.

WillowTree – an audience-focused enterprise app development company – researched potential visitors in terms of motivations and triggers, perceptions of Monticello and Jefferson, and comparisons of Monticello to similar cultural institutions.

These studies helped us refine our intended audience (U.S. families with school-aged children, school groups, and adults age 22-34) and helped us see the barriers faced by new audiences to visiting Monticello. The plan for the reimagined visitor experience will directly address the barriers. For example, one barrier is that some potential visitors believe that “Monticello is not for people like me.” Therefore, our reimagined visitor experience will need to show ways we are open, accessible, and welcoming to our target audiences.

### Civic Engagement Efforts (2019-2021)

Through recent grants from the Peter G. Peterson Foundation and Bloomberg Philanthropies, Monticello will be working over the next couple of years on another necessary component of the 250<sup>th</sup> planning project – finding our niche to promote civic engagement. We know the reimagined visitor experience must focus on the ideals expressed in the Declaration of Independence – freedom and equality. This civic engagement project will: 1) convene civic listening sessions, including a national advisory group of millennials; 2) develop a national education outreach network; and 3) develop a civic engagement toolkit with Monticello resources. As a part of the listening sessions, Monticello staff members will talk with stakeholders about civic engagement and their ideas for Monticello at the 250<sup>th</sup>. In addition, this project will fund an investigation of prior understandings that current and potential visitors bring with them to the site about Thomas Jefferson, Monticello, and the Declaration of Independence.

## AUDIENCE, MARKETING, AND PROMOTION

Based on extensive research in the past couple of years (see Project History), our primary target audience will be U.S. families with school-aged children, school groups, and adults age 22-34. While not inevitable, we expect to see a surge in attendance, especially from these audiences, prior to 2026. We are also focusing on these audiences to strengthen Monticello’s relevance and sustainability for the decades following 2026. The results of this planning grant will impact nearly 5 million guests to Monticello over the next decade.

To help focus our work in this planning process, we have been envisioning the visit of a multiethnic family traveling from Texas with three school-aged children after we have opened the new visitor experience in the spring of 2025. From the time they explore Monticello’s website, they are exposed to consistent learning messages about Monticello and Jefferson, freedom and equality. When they arrive at the Visitor Center, it feels like a place where they belong; they are greeted by activity and inspirational visuals. They easily understand where to go and what options they have during their visit. Their basic needs are met – and even spaces such as restrooms, café, and shop help convey the emotional and cognitive outcomes we have identified. The entire family is pleasantly surprised and engaged. The parents – who had forgotten a lot of what they knew about the Founding era – find easy reminders in exhibit headlines about Jefferson’s history to share with the kids. We affirm some of their reasons to visit – patriotism, curiosity, and an interest in having a shared experience as a family. After we have shared a grounding in the basics and acknowledged their interest in being here, we expand the story based on the most recent scholarship from expert American historians. When they leave, they have an emotional connection to Monticello and the people who lived here. They have a deeper understanding of the oldest constitutional democracy and its founding ideals. They have such a positive, memorable experience that it is something they mention to one another for decades to come and relive through photos and videos. The

children on this trip bring their own children back to Monticello in the 2050s and ensure their grandchildren visit at the time of the tercentennial in 2076.

With this visitor persona profile and experience in mind, the results of this planning grant will impact our marketing efforts as we approach 2026. We will be focusing on this family audience and will incorporate a consistent message related to the cognitive and emotional outcomes we develop through this planning grant.

## EVALUATION OF THE PROJECT'S IMPACT

TJF has already undertaken significant visitor evaluation studies over the past two years. As part of this planning grant, we will undertake a comprehensive guest experience audit of our site to see how Monticello meets our visitors' basic needs, and how we can improve their experiences.

We will seek feedback in several ways to evaluate the efficacy of the plan. First, we will work with researcher Conny Graft to develop a logic model for the new visitor experience. We will know what outcomes we are attempting to achieve and the indicators that mark success. The logic model will be the basis for formative evaluation as we begin implementing the plan. Second, we will present our plans in meetings with critical stakeholder groups, including community members, teachers, bus tour operators, staff, and the descendant community. In these meetings we will discover whether our planned visitor experience has adequately addressed ideas and concerns raised in our initial meetings with these stakeholders. These external stakeholder meetings will be funded by the Peter G. Peterson Foundation, and, therefore not reflected in the work plan and budget below. Finally, we will submit our report for review by the expert advisory group that we created as part of the planning process. Their feedback on the plan will enable us to make adjustments as we move toward the implementation stage of our project.

## ORGANIZATIONAL PROFILE

The Thomas Jefferson Foundation was incorporated on April 13, 1923 to preserve and operate Monticello, the plantation home and architectural masterpiece of Thomas Jefferson. Today, Monticello is a national and international treasure. Designated as a United States National Historic Landmark and a UNESCO World Heritage site, it is the only Presidential residence on the prestigious World Heritage list (among other remarkable sites such as the Great Wall of China, the Egyptian pyramids, and the Taj Mahal). Since its founding, the Thomas Jefferson Foundation has dedicated itself to a two-fold mission: preservation and education. TJF's trustees and staff regard themselves as stewards of Monticello – Jefferson's three-dimensional autobiography – and as educators, who study and share Jefferson's contributions, contradictions, and enduring ideals as well as the history of Monticello as a plantation and the lives and contributions of the more than 400 enslaved people who lived and labored there.

Since 1924, Monticello has welcomed over 29 million visitors. TJF's twenty-first-century vision is to bring history forward into dialogues of national and global significance. As a private, nonprofit 501(c)3 corporation, the Thomas Jefferson Foundation receives no ongoing federal, state, or local government funding in support of its operations. During its existence, TJF has steadily expanded Monticello's functions and holdings. Its stewardship now includes approximately 2,600 of Jefferson's 5,000 acres, of which more than 1,400 are held under protective easements. In addition to the David M. Rubenstein Visitor Center and Carl and Hunter Smith Education Center (2009), large capital projects have included the Jefferson Library and the Saunders-Monticello Trail, both of which were dedicated in 2002.

Monticello's multidisciplinary academic initiatives are conducted through the Robert H. Smith International Center for Jefferson Studies. Founded in 1994 to foster Jefferson scholarship and widely

disseminate findings, the ICJS encompasses Monticello's archaeology, publications, and research departments; the 15,500-squarefoot Jefferson Library; and the editorial operations of *The Papers of Thomas Jefferson: Retirement Series*, a published compilation of Jefferson's written legacy from 1809 to his death in 1826 in partnership with Princeton University. The Center conducts international scholarly conferences, lectures, informal talks, and panel discussions, and has hosted more than 400 scholars from 31 different countries since its founding, significantly expanding the corpus of research on Jefferson and the founding era.

A national board of twenty active trustees and three emeritus trustees, composed of noteworthy leaders in a variety of industries, governs TJF. Trustees determine strategic direction, affirm policy, oversee finances and facilities, and monitor institutional progress. Revenues from ticket sales, retail activities, endowment, and private contributions support TJF's annual budget of approximately \$31 million. The Foundation adheres to sound fiduciary principles and operates on a balanced budget. TJF's staff includes 189 full-time employees, 192 part-time employees, and 140 volunteers. In keeping with TJF's commitment to scholarship, the staff includes seventeen Ph.D.s, and many more with graduate degrees.

**Visitation and Demographic Characteristics:** Welcoming more than 400,000 annual visitors, Monticello's visitation is geographically diverse, coming from every state in the United States and from every continent. Our traditional audience is composed of a mix of families, domestic and foreign tourists, public and private school groups, and senior citizens. Nearly 60,000 students and teachers visited in 2018, with about a third of those engaging in extended learning programs for children, students, school groups, teachers, and families through educational offerings.

The ideas Jefferson articulated in the Declaration of Independence established the foundations of self-government and individual freedom in the United States. Both as an apostle of freedom and a lifelong slaveholder, he is a central figure in our ongoing debates about the legacies of freedom and slavery. As we approach our nation's 250<sup>th</sup> anniversary, Monticello is an essential place to understand the legacies of the founding period, and the promises of the Declaration of Independence. With support from the National Endowment for the Humanities, TJF has devoted decades of scholarship through archaeology, documentary and statistical research, and oral histories. At Monticello, the core values of American Identity are presented not as abstract ideas, but through the lives and stories of Monticello's residents and grounded in the power of this unique historical landscape.

## PROJECT TEAM

**Project Director – Linnea Grim, *Hunter J. Smith Director of Education and Visitor Programs***

Linnea is responsible for overseeing a department of more than 100 people who communicate Monticello's expansive academic scholarship with over 400,000 people per year both on-site and through electronic field trips. Monticello's leadership team has selected her to lead multiple cross-department projects including Monticello's programming committee and the staff committee formed to plan for the 250<sup>th</sup>. Prior to working at Monticello, Linnea held positions in the Curator's Office at the Supreme Court of the United States and with the Smithsonian Institution Traveling Exhibition Service. In addition, Linnea served as a member of the national governing board of the American Association of State and Local History from 2011-2018. She has several publications in the past decade, including authoring a chapter in *Interpreting Slavery at Museums and Historic Sites* (2015). She graduated from the College of William & Mary, magna cum laude, with a degree in history. Her M.A. is in history museum studies from the Cooperstown Graduate Program.

**Niya Bates, *Director of African American History and the Getting Word Oral History Project***

Niya is a native of Charlottesville, Virginia and a two-time graduate of the University of Virginia with an

M.A. in Architectural History and B.A. in African American and African Studies. Her research interests include historic preservation, vernacular cultural landscapes, cultural heritage, slavery and race. Niya is now Public Historian of Slavery and African American Life at the Thomas Jefferson Foundation, where she is director of the *Getting Word Oral History Project*. In this role, she is researching African origins of Monticello's enslaved community, Monticello connections to the American Colonization Society, and social and cultural achievements of descendants of Monticello's enslaved families. Niya is currently serving as Project Manager for the development and installation of a contemplative site on Mulberry Row, where Monticello's visitors will be invited to sit and reflect on difficult subjects and remember the sacrifices made by Monticello's enslaved community. She is currently serving on the board of Preservation Piedmont and is a member of the Landscape Studies Advisory Group for the UVA Landscapes Studies Initiative. Bates recently published an article called "Race and Architectural History: An Appeal" in *Arris: Journal of the Southeast Chapter of the Society of Architectural Historians*.

**Leslie Greene Bowman**, *President and CEO of the Thomas Jefferson Foundation*

Leslie has spearheaded the Foundation's vision to bring history forward into national and global dialogue, propelling restoration, dialogue and programs that offer an honest, complicated and inclusive view of our past – common ground for all Americans. She earned her Bachelor of Philosophy in American history and art history at Miami University, and her Master of Arts in Early American Culture as a Winterthur Fellow at the University of Delaware. She has spent her entire career in museums, and served at the highest levels – Director of the Winterthur Museum, Assistant Director of Exhibitions and head Curator of Decorative Arts at the Los Angeles County Museum of Art, accreditation commissioner for the American Alliance of Museums, and board member of the Association of Art Museum Directors. While in Los Angeles, she enjoyed academic appointments with both USC and UCLA, where she taught American decorative arts history. She is the author of *American Arts & Crafts: Virtue in Design*, and co-author of *American Rococo, 1750-1775: Elegance in Ornament*, each amplifying scholarship on important eras in American art history. She is a trustee emerita of the National Trust for Historic Preservation and a fellow of the Royal Society for the Encouragement of Arts, Manufactures and Commerce in London. She continues to serve on the Committee for the Preservation of the White House, on which she previously served under Presidents Obama, Clinton and Bush.

**Steve Geis**, *Director of Guest Relations*

Steve leads front line guest service departments including ticket reservations and walk up ticketing, the fleet of buses that transport guests, and guest services. In addition, Steven oversees guest feedback including guest post visit surveys along with attendance projection, tracking and analysis. Before joining Monticello in 2013, Steven served as Director of Operations and Director of Facilities at the Kennedy Space Center Visitor Complex and Director of Operations at SeaWorld, San Diego. At Kennedy, his role included exhibit and content development and included two Themed Entertainment Association THEA award winning exhibits. Steven served as Board Chairman of the Florida Attractions Association, Vice Chairman of the Board of the Space Coast Chapter of the American Red Cross and on the board of the San Diego Chapter of the March of Dimes. Steven is a graduate of San Diego State University with a degree in Criminal Justice Administration.

**Gardiner Hallock**, *Robert H. Smith Director of Restoration and Director of Curatorial*

Gardiner has spent much of his career working at Virginia's presidential historic sites. After receiving his masters in Historic Preservation from the University of Vermont, he served as the Restoration Manager at Mount Vernon. Later he moved to the Montpelier Foundation where he was the Director of Architectural Research during the restoration of James Madison's home in Orange County, Virginia. Between Mount Vernon and Montpelier, he co-founded a historic preservation consulting firm that specialized in preservation planning and historic rehabilitation tax credits. Currently he is the Thomas Jefferson Foundation's Robert H. Smith Director of Restoration and Curatorial. Responsibilities include leading the restoration department as it researches, plans, and implements architectural restoration and

conservation projects. Recent major projects have focused on both Mulberry Row and the main house. On Mulberry Row efforts have centered on restoring the physical landscape through reconstructing lost structures and roads. Projects include reconstructing a log slave quarter and a log workshop, restoring the two surviving Jefferson structures - the Mulberry Row Stable and Textile Workshop – and reconstructing the roads that linked Mulberry Row to the main house.

**Emilie Johnson, Ph.D., *Associate Curator***

Emilie is particularly interested in the lived experiences and material culture of women and enslaved people. Emilie holds an MA from the Williams College Graduate Program in the History of Art and a Ph.D. from the University of Virginia in Art and Architectural History. Her research has long focused on the spatial organization of plantations and the ways in which people experienced them. She has recently published on John Hemmings, the enslaved master joiner at Monticello, and led the efforts to interpret Thomas Jefferson's stables and carriage bays.

**Steve Light, *Manager of House Tours***

Steve manages the operation of house tours for more than 400,000 annual visitors. In his role he manages full and part-time historical interpreters, and participates in the training, mentoring, and evaluation of interpretive staff. He also assesses interpretive materials and the development of new experiences. Steve holds an MA from the Cooperstown Graduate Program in History Museum Studies. Prior to his work at Monticello, he worked as the Manager of Museum Programs at the National Baseball Hall of Fame and Museum from 2008-2013.

**Jennifer Lyon, Ph.D., *Communications Officer***

Jennifer serves as Communications Officer for the Thomas Jefferson Foundation at Monticello. In this role, she cultivates and manages public relations efforts and strategic communications. She also coordinates and supports efforts in earned, paid, and social media, as well as digital and traditional advertising. Prior to her work at Monticello, she served as Content Strategist for the Colonial Williamsburg Foundation. She holds an MA and a PhD in American history from the University of Florida.

**Gary Sandling, *Vice President for Visitor Programs and Services***

Gary oversees Monticello's educational and public programs and visitor operations. His role is to leverage the Foundation's scholarly work in ways that are meaningful for our hundreds of thousands of visitors annually through tours, workshops, and activities onsite and digital resources offsite. Before assuming his current position in 2009, Gary was Monticello's Director of Interpretation and Training for four years. He worked for six years at the Colonial Williamsburg Foundation training interpretive staff, planning programs, and as a site supervisor. Gary has served on interpretive planning teams for the exhibitions in the David M. Rubenstein Visitor Center at Monticello as well as restoration and exhibitions efforts in Monticello's upper floor rooms and along Mulberry Row. He was part of the interpretive team that planned the restoration and exhibition of the South Wing restoration project including the chamber lived in by Sally Hemings and her children. He is also a past president of the Virginia Association of Museums, one of the nation's largest state museum associations. He is a 1991 graduate of Vanderbilt University, where he majored in History (High Honors) and Classical Studies. He attended graduate school at Yale University, receiving M.A. and M. Phil. degrees in History.

**Chad Wollerton, *Director of Digital Media and Strategy***

Chad Wollerton is Monticello's Director of Digital Media and Strategy. Since 2000, he has overseen three major redesigns of the main Monticello website, served as project manager for the Monticello Explorer, which won a Webby in 2006, and for the award-winning Slavery at Monticello: Life and Work on Mulberry Row app, which was listed among the best new apps on the App Store in May 2015. He has



overseen the creation and growth of Monticello's social media channels and has helped to develop numerous online projects, including the Monticello Classroom, the Thomas Jefferson Encyclopedia, and the Jefferson Libraries Project.

## HUMANITIES SCHOLARS AND CONSULTANTS

### *Scholars*

**Danielle Allen**, Ph.D., James Bryant Conant University Professor at Harvard University, and Director of Harvard's Edmond J. Safra Center for Ethics, is a political theorist who has published broadly in democratic theory, political sociology, and the history of political thought. Her book, *Our Declaration: A Reading of the Declaration of Independence in Defense of Equality* (2014), makes a compelling argument for the underappreciated elements of equality not only as theorized in the declaration but as practiced in its enactment and its reception.

**Ed Ayers**, Ph.D., is Tucker-Boatwright Professor of the Humanities at the University of Richmond, where he is President Emeritus. He won the National Humanities Medal in 2013 for his "commitment to making our history as widely available and accessible as possible." Ed has over four decades of experience writing history, experimenting with digital scholarship, collaborating in public history, and teaching and leading in higher education. Ed has tried to find new ways to connect people with the American past.

**Christa Dierksheide**, Ph.D., is joining the faculty at the University of Virginia having spent the past two years at the University of Missouri. Prior to her time at Missouri, she was Historian at the Robert H. Smith International Center for Jefferson Studies at Monticello. She completed her M.A. and Ph.D. at the University of Virginia. Her first book, *Amelioration and Empire: Progress and Slavery in Plantation America, 1770-1840* (University of Virginia Press, 2014), examined how planters embraced the European Enlightenment idea of "improvement" on New World plantations. She conceptualized and wrote current exhibitions in the David M. Rubenstein Visitor Center at Monticello, including "The Boisterous Sea of Liberty" and "The Landscape of Slavery: Mulberry Row at Monticello" and is also co-author of "Thomas Jefferson's Worlds," the introductory film.

**Annette Gordon-Reed**, J.D., is the Charles Warren Professor of American Legal History at Harvard Law School and a Professor of History in the Faculty of Arts and Sciences at Harvard University. Gordon-Reed won sixteen book prizes, including the Pulitzer Prize in History in 2009 and the National Book Award in 2008, for *The Hemingses of Monticello: An American Family* (W.W. Norton, 2008). In addition to articles and reviews, her other works include *Thomas Jefferson and Sally Hemings: An American Controversy* (UVA Press, 1997). *Vernon Can Read! A Memoir*, a collaboration with Vernon Jordan. (PublicAffairs 2001), *Race on Trial: Law and Justice in American History* (Oxford University Press, 2002), a volume of essays that she edited, *Andrew Johnson* (Times Books/Henry Holt, 2010) and, most recently, with Peter S. Onuf, "Most Blessed of the Patriarchs": *Thomas Jefferson and the Empire of the Imagination* (Liveright Publishing, 2016). Gordon-Reed was the Vyvyan Harmsworth Visiting Professor of American History at the University of Oxford (Queens College) 2014-2015. Between 2010 and 2015, she was the Carol K. Pforzheimer Professor at the Radcliffe Institute for Advanced Study at Harvard University. She was the 2018-2019 President of Society for Historians of the Early American Republic. She is the current President of the Ames Foundation. A selected list of her honors include a fellowship from the Dorothy and Lewis B. Cullman Center for Scholars and Writers at the New York Public Library, a Guggenheim Fellowship in the humanities, a MacArthur Fellowship, the National Humanities Medal, the National Book Award, the Frederick Douglass Book Prize, and the George Washington Book Prize, and the Anisfeld-Wolf Book. Gordon-Reed was elected a fellow of the American Academy of Arts and Sciences in 2011 and is a member of the Academy's Commission on the

Humanities and Social Sciences. In 2019, she was elected as a member of the American Philosophical Society.

**Peter Onuf**, Ph.D., is a Thomas Jefferson Foundation Professor Emeritus in the Corcoran Department of History at the University of Virginia, Senior Research Fellow at the Robert H. Smith International Center for Jefferson Studies and Mellon Distinguished Scholar in Residence, American Antiquarian Society, Worcester, Massachusetts, 2017-2018. A specialist in the history of the early American republic, Onuf was educated at Johns Hopkins University, where he received his BA in 1967 and Ph.D. in 1973, and has taught at Columbia University, Worcester Polytechnic Institute and Southern Methodist University before arriving in Virginia in 1990. Onuf's work on Thomas Jefferson's political thought, culminating in *Jefferson's Empire: The Language of American Nationhood* (University Press of Virginia, 2000) and *The Mind of Thomas Jefferson* (2007, also Virginia), grows out of earlier studies on the history of American federalism, foreign policy, and political economy. He and co-author Annette Gordon-Reed recently published *Most Blessed of Patriarchs: Thomas Jefferson and the Empire of the Imagination* (Liveright, 2016) and his *Jefferson and the Virginians: Democracy, Constitutions, and Empire* was published in 2018 by Louisiana State University Press. With Ed Ayers and Brian Balogh, Onuf was founding co-host of the public radio program "Backstory with the American History Guys."

#### *Museum Consultants*

**Melanie Adams**, Ph.D., has been recently named the Director of the Smithsonian's Anacostia Community Museum, effective August 5, 2019. Adams currently serves as Deputy Director, Learning Initiatives, at the Minnesota Historical Society. With more than 25 years of community engagement experience in museums and higher education, she is dedicated to bringing stakeholders together to address relevant community issues. Before her time at the Minnesota Historical Society, Adams was a Managing Director of the Missouri Historical Society for 11 years. She focused her work on addressing the cultural and social concerns of the St. Louis community. Adams was President of the Association of Midwest Museums (2014-2016) and currently serves on the council of the American Association for State and Local History. She holds a BA in English and African American studies from the University of Virginia, a MA, Education from the University of Vermont and Ph.D. from the University of Missouri St. Louis in Educational Leadership and Policy Studies.

**Kayleigh Bryant-Greenwell** is the current Head of Public Programs at the Smithsonian American Art Museum. She is a Washington, DC native and an award-winning cultural programmer with over ten years of GLAM experience (Galleries, Libraries, Archives, Museums), devoted to exploring ways to engage with marginalized audiences through arts education in museums. In her role as Education Specialist with the Smithsonian Institution National Museum of African American History and Culture, she curated participatory public programs focusing on social justice issues, which empowered museum audiences to share their own ideas towards equity. As a curator, she has produced several contemporary art exhibitions exploring race, gender, politics and social issues. She has served in the leadership of the DC Chapter of ArtTable, Inc. since 2014, and recently served as Chapter Co-Chair. She received her BA, Art History from the University of Maryland in 2009 and M.A., Museum Studies from The George Washington University in 2011.

**Carter C. Hudgins**, Ph.D., is the current President and Chief Executive Officer of Drayton Hall Preservation Trust, a National Trust for Historic Preservation site located in Charleston, South Carolina. Hudgins received his BA, History from Hampden-Sydney College in 2000 and his MA and Ph.D., History/Material Culture from Royal Holloway, University of London in 2002 and 2006, respectively.

Hudgins began his career as an archaeologist at Historic Jamestown and has been in his current role as President and CEO of Drayton Hall since 2015.

**Linda Norris** has been long been a leader in facilitating conversation and action surrounding the ways creativity can transform museums and other organizations, shaping more compelling narratives and creating deeper, more inclusive, authentic community connections. She is the co-author of *Creativity in Museum Practice* and blogs at *The Uncataloged Museum*. Currently, as the Global Networks Program Director at the International Coalition of Sites of Conscience, she leads the Coalition's programmatic work in Asia, Africa, Russia, Latin America/Caribbean, Europe, North America, and the Middle East and North Africa, helping to build the capacity of members in 65 countries through trainings and workshops, cross-regional exchanges and collaborations. Alongside her work at the Coalition, she is also an adjunct instructor in the Johns Hopkins University's online Museum Studies Program and Cultural Heritage Programs. She has led teams in re-interpretation of historic sites and coordinated exhibition projects from concept to installation.

**Richard Rabinowitz**, Ph.D., is one of the leading public historians in the country, with over 45 years of experience in creating new museums and exhibitions on every aspect of American history and culture. As Founder and President since 1980 of American History Workshop, Rabinowitz has led the creative work of scholars, curators, educators, artists, architects, designers and institutional planners in fashioning over 500 successful and innovative history programs at sites like the New-York Historical Society, the Lower East Side Tenement Museum in New York, the Birmingham Civil Rights Institute, the National Underground Railroad Freedom Center in Cincinnati, state heritage parks and local and regional historical societies in 33 states and the District of Columbia. He is a graduate of Harvard College and received his Ph.D. from Harvard University in 1977.

**Orlando Serrano**, Ph.D., is the Manager of Youth and Teacher Programs at the Smithsonian's National Museum of American History. He holds a B.A. from Point Loma Nazarene University in Philosophy and Theology, a M.A. from California State University Fullerton in American Studies, and a Ph.D. from the University of Southern California in American Studies and Ethnicity. Serrano manages the museum's educational programs for young people and educators. He supports and develops informal educational and leadership experiences for students, professional development workshops for educators, and curriculum content. He is an experienced educator with expertise in teacher professional development, assessment, instruction, and educational technologies. His research and writing have been funded by a Ford Foundation Fellowship and National Science Foundation EDGE-SBE Grants.

#### WORK PLAN

2020	Activity	Participants	Outcomes
March	NEH grant announcement		
June	Visitor experience audit begins (report due by Dec. 15, 2020)	Vendor TBD; process led by Steve Geis, Director of Guest Relations	Report with findings
June	Benchmarking trip #1 – Charleston / Savannah	TJF project team	Trip synthesis document

August	Expert advisory meeting (2-day meeting)	Expert advisory panel	Recommendations on themes and storytelling elements
September	Benchmarking trip #2 – New York City / Hudson River Valley	TJF project team	Trip synthesis document
November	Benchmarking trip #3 – San Francisco / Monterey	TJF project team	Trip synthesis document
<b>2021</b>			
January	Logic Model Development	Conny Graft and TJF project team	Identified and measurable visitor experience outcomes
Jan.-Feb.	Visitor experience plan written	TJF project team	Visitor Experience Plan
Feb.-Mar.	Visitor experience plan internally revised	TJF stakeholders	Revised experience plan
March	Comments on visitor experience plan from advisory panel	Expert advisory panel	Revised experience plan
April	Present plan to TJF Board of Trustees at spring board meeting	Board of Trustees	Revised and approved experience plan
May	Final grant report submitted	TJF project team	

## PROJECT FUNDING

As a critical part of TJF's current strategic plan, developing the visitor experience in 2026 has received significant internal support and resources. The NEH planning grant will cover direct costs for developing the 2026 master interpretive plan. Internal TJF staffing, aside from the Project Manager, will not be charged to the NEH grant. Recent grants from Blomberg Philanthropies and the Peter G. Peterson Foundation will supplement research and outreach efforts, with results incorporated into the plan. With funding from the NEH planning grant, all funding needs for this project would be in hand.

TJF has a strong record of ambitious fundraising, including the recent completion of the *We Hold These Truths* capital campaign. The campaign raised \$76 million, more than \$11 million over the goal. We are confident that we will be able to secure the resources necessary to implement the ideas developed in this master interpretive plan.