

Narrative Section and Design Document of a Successful Application

The attached document contains the grant narrative and design document of a previously funded grant application. It is not intended to serve as a model, but to give you a sense of how a successful application may be crafted. Every successful application is different, and each applicant is urged to prepare a proposal that reflects its unique project and aspirations. Prospective applicants should consult the Public Programs application guidelines at http://www.neh.gov/grants/public/digital-projects-the-public for instructions. Applicants are also strongly encouraged to consult with the NEH Division of Public Programs staff well before a grant deadline.

Note: The attachment only contains the grant narrative and design document, not the entire funded application. In addition, certain portions may have been redacted to protect the privacy interests of an individual and/or to protect confidential commercial and financial information and/or to protect copyrighted materials.

Project Title: Slavery in the North Website Project

Institution: Historic Hudson Valley

Project Director: Ross Higgins

Grant Program: Digital Projects for the Public: Prototyping Grants

Historic Hudson Valley – Slavery in the North Website Project

A. Nature of the Request

Historic Hudson Valley (HHV) is requesting \$100,000 to develop a working prototype that demonstrates the integration of humanities ideas, digital technology, and public outreach for an online interactive documentary tentatively titled *Slavery in the North*. The website will shed light on the often-overlooked history of slavery in the colonial North, with a special focus on individual stories as a means to personalize the past. The project is an outgrowth of the National Endowment for the Humanities-funded reinterpretation of Philipsburg Manor, HHV's National Historic Landmark in Sleepy Hollow, NY. Since this reinterpretation, HHV has presented the history of northern colonial slavery at Philipsburg Manor for hundreds of thousands of onsite visitors. Now, empowered by the accessibility and flexibility that a digital platform offers, and moved by issues of race emerging in the national conversation, HHV is determined to bring this history online for a vast audience.

Having undergone a rigorous Discovery phase with a Digital Projects for the Public grant, HHV is seeking funding to create a proof-of-concept prototype for *Slavery in the North*. Rooted in the history of Philipsburg Manor, a 26-acre living history museum that presents northern enslavement as its primary interpretive theme, HHV's proposed website will advance HHV's strategic goals and transform the way we engage the public though digital and experiential learning. Rather than an examination of the institution of slavery, *Slavery in the North* will present a collection of individual stories and experiences of enslaved people. The names of the enslaved men, women, and children listed on Adolph Philipse's 1750 probate inventory, as well as runaway slave ads, legal and court documents, slave narratives, and other primary sources related to northern slaveholdings serve as entry points for exploring the human dimensions of slavery. Philipsburg Manor stands as the primary case study, augmented by additional content representing New York, Connecticut, Massachusetts, New Hampshire, New Jersey, Pennsylvania, and Rhode Island. The website, operating as an **interactive documentary**, will provoke thought and help audiences make connections to the past. Through consultations with our advisors, **HHV has articulated the following <u>humanities themes</u> for the project:**

- 1. Colonial economic development depended upon the enslaved.
- 2. The inhumanity of enslavement stems not from the labor or living conditions, but from the classification of captive Africans as <u>property rather than person</u>.
- 3. Resistance (in its many forms) by slaves was a means of reasserting personal volition.
- 4. Manumission was gradual, not uniformly adopted by the northern states, and did not equal equality.

The attached Design Document serves as our blueprint for presenting this content. Continuing our successful collaboration with design firm C&G Partners and evaluation firm ExposeYourMuseum, HHV will use the Prototyping grant to: 1) Consult with humanities scholars, museum professionals, education advisors, transmedia experts, and multi-platform storytellers; 2) Compile and expand upon content relating to all northern colonies; 3) Refine the website structure and hierarchy; 4) Develop scripts and digitize selected assets; 5) Develop a website prototype; 6) Test and evaluate the user experience; and 7) Finalize the website design and technical specifications in preparation for Production. The total budget for this phase is \$158,836.

B. Humanities Content

Introduction

HHV's digital project is **deeply grounded in humanities scholarship and will inform a topic of national historical significance**—**enslavement in the American North**. HHV tells this story onsite at Philipsburg Manor through the lives of the 23 enslaved individuals who operated the provisioning plantation in the 18th century. Adolph Philipse's probate inventory, which lists all of the enslaved individuals living at Philipsburg Manor in 1750, serves as our touchstone. A reading of it, informed by decades of commissioned research reports, archeological excavations, and humanities scholarship, has given HHV powerful insights into a population for which very few records exist—the enslaved. What we know about the identities of the individuals owned by Adolph Philipse—their names, skilled trades, family relationships, languages, cultural and religious practices—distinguishes Philipsburg in the context of African American historic presentation. **Importantly, it allows us to individualize the often anonymous institution of northern colonial slavery.**

Before the NEH invested \$340,000 in Philipsburg Manor's reinterpretation, this history was a story untold. Not only was the educational focus at the site narrowly trained on the lives of the prominent Philipse family, but our national understanding of slavery was largely relegated to a textbook study of the antebellum South. Today, thanks to the NEH's catalytic support, Philipsburg Manor presents the history of northern colonial slavery and its effects on the commercial, economic, and cultural development of New York. HHV's permanent African American Advisory Board established two goals for the interpretation:

- 1. As a living history museum, Philipsburg Manor will set the standard for interpreting enslavement in the northern colonies. With a thought-provoking and hands-on approach, the site and its collections will enable visitors to better understand the varied individual relationships among slave, owner, and tenant, and the inseparable institutional relationships among enslavement, commerce, and culture.
- 2. *As a resource*, Historic Hudson Valley will provide research materials necessary to academics, educators, and students of history for public discourse on the history and legacy of enslavement. Through educational and community outreach, programs, and special events, HHV will spark interest in public history, provide an open environment for scholarly debate, and encourage new interpretive methods for presenting these and related issues to our visitors.

HHV takes seriously our role as <u>interpreter</u> of this history. Because Philipsburg Manor is comparably well documented, HHV has been able to dig beneath the surface and explore the identities, skills, family connections, and cultural retention practices among the enslaved population at the site. However, even with this breadth of material, we still only get a partial view of history and must therefore use interpretation to evoke the human experience of slavery. With staff trained not only in the content, but also in the presentation skills necessary for this complex and sensitive story, HHV has realized the first goal of the reinterpretation with great success. However, in order for HHV to develop this story on a larger scale and become a resource for a wider public, we must improve our online presence. **As with the onsite experience, HHV's digital project will use <u>story and interactivity</u> as a means to convey this history to a general audience.**

Research and Scholarship

It was not until the late 1960s that historians began to shift from slavery as an economic institution to in-depth studies of enslaved life. John Blassingame, Eugene D. Genovese, and Herbert Gutman examined the cultural practices that sustained enslaved Africans in America: belief systems, kinship networks, naming practices, music, and folk tales. Following the publication of these works, the issues that they introduced received a great deal of scholarly attention including Ira Berlin's *Many Thousands Gone: The First Two Centuries of Slavery in North America*; Gary B. Nash's *Forging Freedom: The Formation of Philadelphia's Black Community, 1720-1840*; Shane White's *Somewhat More Independent: The End of Slavery in New York City, 1770-1810*; and William D. Pierson's *Black Yankees: The Development of an Afro-American Subculture in Eighteenth-Century New England.* Other scholars have focused on slavery in rural settings including Graham Russell Hodges (*Slavery and Freedom in the Rural North: African Americans in Monmouth County, New Jersey, 1665-1865*) and A. J. Williams-Myers (*Long Hammering: Essays on the Forging of an African American Presence in the Hudson River Valley to the Early Twentieth Century*). Archeological discoveries such as the African Burial Ground in lower Manhattan and the Sylvester Manor provisioning plantation on Shelter Island represent additional sources of information about slavery at specific northern sites.

HHV has contributed to this body of work by commissioning such studies as "The Physical Experience of Northern Slavery: Housing, Food, Health and Medical Care" by Susan Klepp (1995); "The Slaves of Philipsburg Manor Upper Mills" by Jacquetta Haley (1988); "Slaves and Slave Holding in New York's Philipse Family, 1660-1750" by Dennis J. Maika (1997); and "The Slaves' Garden at Philipsburg Manor" by Margaret Vetare (2003). These and related research reports continue to inform the onsite experience at Philipsburg and will help to build the intellectual foundation of the new website. Beginning in Discovery and continuing in 2016, HHV is reviewing new scholarship that has surfaced since the reinterpretation. Outside of Philipsburg, we are looking to identify more stories and resources pertaining to other northern historic sites where slavery existed (and beyond HHV's own Van Cortlandt Manor and Montgomery Place) including the Bush-Holley House (Cos-Cob, CT), Mont Gulian (Beacon, NY), Peter Mott House (Lawnside, NJ), African American Meeting House (Nantucket, MA), and Cliveden (Germantown, PA).

Over the last 12 years, several books have been published that have enriched HHV's interpretation of northern colonial enslavement. Consulting scholar Leslie M. Harris's *In the Shadow of Slavery: African Americans in New York City, 1626-1863* (University of Chicago Press, 2003) examines issues of race and class through two centuries of slavery. Harvard historian Jill Lepore consulted HHV's library collections while writing *New York Burning: Liberty, Slavery, and Conspiracy in Eighteenth Century Manhattan* (Alfred A. Knopf, 2005), which focuses on a single event: the 1741 "Great Negro Plot" to burn New York City and murder those who came to put out the flames. Prior to Lepore's book, the ordeal of Adolph Philipse's enslaved man Cuffee inspired an original screenplay by HHV's Associate Director of Education, Michael A. Lord, entitled: *The Fire This Time: Cuffee's Trial*. Performed in front of sold-out audiences at multiple venues following the Philipsburg reinterpretation, including the New-York Historical Society and St. Paul's Church National Historic Site in Mount Vernon, this courtroom drama will have a presence on *Slavery in the North*.

Historical research has added to the knowledge base of HHV's staff and, ultimately, the public. Two works stand out for their contributions to public history: *Representations of Slavery: Race and Ideology in Southern Plantation Museums*, by Jennifer L. Eichstedt and Stephen Small (Smithsonian Institution Press, 2002) and *Slavery and Public History: The Tough Stuff of American Memory* edited by James O. Horton and Lois Horton (University of North Carolina Press, 2008). The February 2014 publication of *The Public Historian* revisits the interpretation of enslavement in the years following Horton's book. Of note in this issue of the *Historian* is an interview with HHV's Discovery-phase advisor Azie M. Dungey, creator of the *Ask A Slave* web series, in which she discusses the difficulties encountered when presenting slave life as a first-person interpreter at Mount Vernon. Also, the newly published book *Best Practices for Interpreting Slavery at Historic Sites and Museums* (Rowman & Littlefield, 2014) indicates that there are successful, nationally recognized models to follow (including *Philipsburg Manor*, which serves as a case study in one chapter of this book), as well as sites where good models are needed to inspire change. These publications critique the various interpretations of slavery and race at historic sites and will continue to inform HHV's strategies for the proposed website.

Convening of Humanities Advisors

On April 23-24, 2015, HHV convened a distinguished group of humanities scholars, museum professionals, education consultants, and media experts to examine the humanities content, learning objectives, and narrative treatment of this website project. In addition to members of HHV's African American Advisory Board, as well as staffs from our digital programs, library, curatorial, and education departments, the group consisted of: Ana Lucia Araujo, Ph.D. (Howard University), Laura Chmielewski, Ph.D. (Purchase College, State University of New York), Azie M. Dungey (*Ask a Slave* web series), Leslie M. Harris, Ph.D. (Emory University), Jacqueline A. Simmons, Ed.D. (Columbia University), and Kate Tinworth (Evaluator, Expose YourMuseum). The group pored over the humanities themes and tackled difficult questions for the website such as: "Where does the story begin and end?"; "What is the narrative arc?"; "Who is the intended audience?"; "What types of content are needed to advance the site's learning goals?"; "How do we organize this content for web-based engagement?"; and "How do we appropriately and respectfully tell stories with little or no evidence?" Jeffrey W. McClurken, Ph.D. (University of Mary Washington), who, along with a digital media background has taught college-level courses on American slavery, participated remotely.

Through two days of discussion (including a tour of Philipsburg Manor) and through their continuing consultation with HHV, this interdisciplinary team has reinforced the intellectual foundation of the project. Group consensus was reached on three major points: 1) HHV's scholarship from the reinterpretation, augmented by external scholarship and research planned for the Prototyping phase, is sound and relevant; 2) HHV should embrace fictional narrative as a teaching tool in instances where historical evidence is limited or non-existent; and 3) To foster effective learning, engagement, and empathy, the website content should be driven by the following **four humanities themes**:

1. Colonial economic development depended upon the enslaved.

We need to understand that slavery and the African American presence were fundamental to the building of a nation, point blank. – Leslie M. Harris, Ph.D., April 2015

Throughout the northern colonies, both the labor of the enslaved and the establishment of the transatlantic slave trade proved to be vital to the region's developing economy. From the fertile valley of the Hudson River to the shorelines of Long Island, provisioning plantations used enslaved labor to produce staple foods such as flour and butter for export to the sugar islands of Barbados and Curacao. New England merchants in Boston, Newport, Salem, and New London established profitable trade routes delivering human cargo from Africa to the West Indies in exchange for molasses, distilled into rum in refineries along the New England coast, and shipped back to the West African coast in exchange for more captive Africans. As early as 1644, merchants in Salem were sending locally built ships to make the so-called "triangle trade" route among Africa, the West Indies, and New England. By the middle of the 18th century, nearly two-thirds of Rhode Island's fleet was engaged in the slave trade, and New York City was second only to Charleston, SC, among urban centers of slavery.

Legal codes that bound slaves were the same throughout the English colonies in their attempt to control and dehumanize enslaved workers. The nature of northern agriculture combined with the growth of commercial enterprises such as Philipsburg Manor gave rise to a work force that included a high proportion of African American artisans skilled in different trades—such as Caesar, the enslaved miller, and Dimond, the enslaved riverboat pilot, both of whom were vital to Philipsburg's operation. The labor of these and the thousands of other enslaved Africans was instrumental in the early success of the colonies.

As HHV established during the reinterpretation, Philipsburg Manor is a case study of a larger American story. At its zenith, the estate was a rural, proto-industrial complex with strong ties to Manhattan and the Atlantic world. Merchant ships sailed up the Hudson and docked at the Philipsburg wharf on the Pocantico River. There they were loaded with provisions like wheat flour ground by Caesar in the site's gristmill and butter churned by Massy, a dairymaid. By focusing on these enslaved individuals whose labor helped to fuel the Philipses' commercial empire, HHV is able to localize this history and connect it to our broader humanities themes. Similarly, this project aims to recognize the vast number of enslaved people who played a crucial role in building America's economy.

2. The inhumanity of enslavement stems not from the labor or living conditions, but from the classification of captive Africans as property rather than person.

In late January 1750, an "Inventory of all and Singular the goods, Rights Chattels & Credits of the Estate of Mr. Adolph Philipse Deceased" was undertaken. Included in the four pages of "movable property" at the Upper Mills, alongside the cattle, horses, and silverware, were the names of 23 enslaved men, women, and children. The "negro property" included the skilled laborers required to run a milling operation, several farmers on the site, a small domestic staff, eight young children, and several "men not fitt for work." One of the young children listed on the inventory was an eight-year-old boy named Sam. On April 19, 1750, Sam was sold for £62 to Abraham DePeyster at public vendue. Sampson, the man we infer was his father, was also enslaved at Philipsburg Manor and had been sold a few weeks before to Lawrence Cortwright for £75.

As an historian, I struggled with my professional objectivity when I first read about the separation of a father from his son. As a father, the thought of being forcibly separated from my children is unbearable. Still to this day, when I speak to museum visitors about the plight of Sam, Sampson, and the others enslaved at Philipsburg Manor, I see mothers and fathers, grandparents and children, grappling with the harsh realities of the past while making personal connections with the present. – Michael A. Lord (Project Team), 2013

Since 2002, HHV has been delivering this emotional and educational experience to hundreds of thousands of onsite visitors, thanks to our nationally recognized, NEH-funded reinterpretation of Philipsburg Manor. When visitors learn that Sam and Sampson were separated during the spring of 1750, they begin to understand the human tragedy of enslavement—that slaves were treated as property rather than person. From students to retirees, visitors to the site often express anger at the system of enslavement and suggest that they would have resisted through various acts of rebellion, violence, and by running away. By establishing an immediate, empathetic connection to people of the past, it is our hope that visitors to our online documentary will be moved to ask themselves: *How would I have reacted in this situation?*

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¹ MssCol 2412, Adolph Philipse estate records, Manuscripts and Archives Division, The New York Public Library.

3. Resistance (in its many forms) by slaves was a means of reasserting personal volition.

Similar to the onsite experience, visitors to the new website will discover that individuals coped with enslavement through a complex range of responses as they attempted to improve their circumstances. The retention of African cultural practices and the struggle to build and maintain families also countered the dehumanizing aspects of bondage. Such cultural retention is evident in the survival of African names, language, music, and rituals such as Pinkster, a traditional African American celebration of spring (which HHV has been presenting at Philipsburg for 37 years). Enslaved Africans also developed survival skills such as collectively setting a sustainable pace of work for group tasks, feigning illness or ignorance, or even sabotaging equipment as a means of resisting the physical exhaustion of slave labor. More overt methods for fighting the system included running away (or "stealing oneself" as abolitionist Frederick Douglass termed it) and open rebellion such as the slave uprisings of 1712 and 1741. Still, others chose accommodation.

Although every type and individual feat of resistance has its own story, there is much to be learned from the act of "stealing oneself." The hundreds of runaway ads printed in colonial newspapers provide us with a wealth of knowledge about enslaved individuals and their community. The ads show evidence of ongoing, active resistance by individuals against the institution of slavery and give us a glimpse into the physical appearance, skills, education, personalities, and the perceived behavior of those who chose to run. Running away often meant more than finding freedom; individuals frequently ran to find or maintain family. For example, a notice from March of 1763 describes a woman named Lucretia who chose to run away while pregnant. Another speaks of a 10-year-old enslaved girl, Dinah, who, in April of 1778, was "stolen by her mother," a woman named Cash.

Unlike traditional textbook treatments, these primary documents shed light on the <u>individuals</u> who were enslaved. Their relevance was recently reaffirmed by an NEH Digital Humanities Start-Up grant awarded to Cornell University to develop a database of runaway slave ads from pre-1865 U.S. newspapers. This database, which will draw from several historical collections and experiment with crowdsourcing, is an exciting development. It also attests to the interpretive expertise of history museums such as HHV to add appropriate context. HHV's proposed website will not only feature these ads but it will also help users "read between the lines" to understand the choices made by real people. Indeed, **the defiant act of running away represented a powerful assertion of one's humanity at a time when slaves were defined as property**. In this vein, a subsection of the website will include educational resources for HHV's *Runaway Art: Interpreting Colonial Slave Ads* program. Fueled by a multi-year grant from The New York Community Trust, *Runaway Art* uses local 18th-century runaway slave ads as a springboard for thousands of New York City students to create an original artwork and essay. The program is a successful example of how HHV is working to foster empathy and engagement with history among schoolchildren.

4. Manumission was gradual, not uniformly adopted by the northern states, and did not equal equality.

Through legislative acts, judicial cases, and constitutional decree, manumission took many forms in the northern states; it was also lengthy, contested, and often ignored. Most northern states adopted a gradual manumission that ensured slave owners a period of 18-28 years to determine how to divest themselves of their human property. Pennsylvania's 1780 legislative "Act for the Gradual Abolition of Slavery" set the standard for most northern states. Any person born in Pennsylvania after March 1, 1780 was born free. Those enslaved in Pennsylvania before the 1780 law went into effect, however, remained enslaved for life. It wasn't until 1847 that another act of the legislature declared all Pennsylvanians free. Over the next four years, Rhode Island, Connecticut, and New Hampshire all passed similar bills for gradual abolition. The process of complete abolition, however, took decades. Although Connecticut's gradual abolition began in 1784, the State did not end slavery until 1848. In New Hampshire, slaves were noted on the 1790 and 1800 censuses, and the State did not officially end slavery until 1857.

New York and New Jersey, with larger enslaved populations than the New England states, began their gradual emancipations in 1799 and 1804, respectively. Any persons born after those dates were considered free, although they were required to serve their former owners for a period of 25-28 years. New York eventually abolished slavery for all in 1827. New Jersey never fully abolished slavery until it ratified the 13th amendment in December of 1865. Massachusetts was the only state to end enslavement by a ruling of the state's Supreme

Court. In the *Commonwealth v. Jennison* case, an enslaved man named Quock Walker sued his owner for his freedom. The court ruled that he was free and subsequently used the Massachusetts Declaration of Rights, which states that "all men are born free and equal," as the basis for abolishing slavery under the Massachusetts Constitution. Four years later, in 1787, the first cotton manufactory in the U.S. was established in Beverly, MA. Perversely, the abolition of northern slavery coincided with the establishment of textile mills in New England where profits were made through the use of southern cotton cultivated by enslaved labor. By examining this history and depicting it through an interactive timeline, HHV's project aims to provide further insight into the legacy of race-based slavery and its impact on issues of discrimination and inequality.

Examples of Priority Website Content and Relation to Humanities Themes

Content Type	Examples	Relation to Humanities Themes
	1750 probate inventory	People as property
Documents	Deposition from <i>The Charles</i>	Colonial economic development depended on enslaved
2 ocuments	New York Slave Code	People as property
	Manumission Acts of 1799	Emancipation was gradual, did not ensure equality
Runaway slave ads	Nell, New-York Weekly Post-boy, April 23, 1753	Resistance; People as property
	Slave Market in New York	People as property
Images - historic and contemporary	Portrait of the Potter Family (RI)	People as property
	Image of enslaved child's shoes next to an adult's	People as property
	Cuffee on the stand at 1741 trial	Resistance
Illustrations - commissioned for	Enslaved woman churning butter	Colonial economic development depended on enslaved
project	Caesar, the enslaved miller	Colonial economic development depended on enslaved
	Negro House	People as property; Resistance (covert)
Maps	Historic map of Africa; <i>Novi Belgii</i> map of New Netherland; Ratzer 18th-century map of Manhattan	Colonial economic development depended on enslaved
	Dramatic vignette of "On the Run"	Resistance (overt)
	Performance of traditional African dance at Pinkster	Resistance through cultural retention (covert)
Videos - contemporary	Costumed interpreter operating gristmill at Philipsburg	Colonial economic development depended on enslaved
	Filmed interviews with humanities advisors, AAAB members, Vanessa and Helen Williams, and HHV's staff interpreters at Philipsburg	All
	Excerpt from 1741 slave rebellion trial transcript	Resistance (overt)
Audio	Venture Smith narrative	All
	Recitation of African folktales; work songs	Resistance (covert)
Objects	Reproduction chocolate pot and cups, hard tack, beaver pelts, mill stones from Philipsburg	Colonial economic development depended on enslaved
	Slave shackles	People as property
Data graphics	Men v. women in rural and urban settings; monetary value of a slave's work	Colonial economic development depended on enslaved
Comparisons - contemporary v. historic	Driver's license v. passport to receipt; contemporary real estate ad v. vendue ad	People as property

Contemporary Relevance

The Philipsburg Manor reinterpretation continues to inform HHV's onsite programming and shape the content for the website. However, since 2002, the landscape in which we present this content has changed dramatically, from sociopolitical issues to pop culture to technological advancements. Developments in the following categories demonstrate that this project is of particular interest to a 21st-century audience.

Issues of Race/Legacy of Slavery in Law, Jurisprudence, Government

At a time when many American historical institutions struggle to retain or redefine their importance to the public, HHV's website reinforces the lesson that the story of enslavement and resistance in the colonial North remains relevant and timely. The 2008 election of President Barack Obama, followed by key appointments of African American cabinet members including Eric Holder and Loretta Lynch, led many Americans to conclude that the nation had entered a "post-racial" phase. Recent Supreme Court rulings on sections of the Voting Rights Act of 2012 and Affirmative Action initiatives have sparked debate on the usefulness of legal protections for minorities, which some justices see as outdated. Yet, racial bias persists on all fronts, from widening socioeconomic gaps, to the use of a derogatory chant by a University of Oklahoma fraternity, to the tragic deaths of Trayvon Martin, Michael Brown, Eric Garner, and Freddie Gray. While some argue that these are isolated events, others contend that racial injustice has permeated all levels of society, thus sparking the nationwide movement (complete with Twitter hashtag), "Black Lives Matter." Through sharing history and linking it to contemporary events, the website will advance the conversation.

Popular Culture

As a nation, our interest in the diverse aspects of American enslavement continues to grow, along with our knowledge of the institution. American students and consumers of popular culture often express amazement that slavery was much more than a regional southern phenomenon and had existed for centuries before cotton became a major American crop. In the past decade, this level of interest has made inroads into various entertainment industries. Treatments of the topic on television speak of a growing presence of African American history-focused programs. Prominent examples are the PBS series *The African Americans: Many Rivers to Cross* (2013) and *African American Lives* (2006), both hosted and produced by Harvard scholar Henry Louis Gates, Jr. ABC and BET have recently created fictional series based on American slavery: "Forever" and "The Book of Negroes," respectively. This attention recently crossed over to the big screen. Quentin Tarantino's *Django Unchained* (2013) features an enslaved hero who combats the institution with violent resistance and was a box office success. Steve McQueen's Academy Award-winning *12 Years a Slave* (2013), taken from Solomon Northrup's 1853 narrative, tells the personal story of an overlooked chapter in American enslavement: the "reverse Underground Railroad." As these examples illustrate, **interest in American enslavement and freedom has grown in popular culture, and we are increasingly comfortable with humanizing the institution as a means to understanding it more fully.**

Cultural and Academic Institutions

HHV's quest to create an interactive documentary on slavery in the North is in part motivated by recent endeavors to address this part of our nation's history. Foremost among these is the Smithsonian's National Museum of African American History and Culture (opening in 2016), which recently made international news with the discovery of a sunken slave ship off the coast of South Africa. Other relevant examples include:

- The creation of the Center for the Study of Slavery and Justice at Brown University (2012-13), which stems from the University's grappling with how the slave trade benefited the school.
- The Mulberry Row project and new *Slavery at Monticello* app (2015) at Thomas Jefferson's Monticello, which bring the experience of enslaved individuals to the forefront of the site experience and demonstrates an institutional commitment to sharing a more inclusive history.
- The Whitney Plantation Museum in Wallace, LA (2014), which, while focused on the South, uses first-person slave narratives as a means to preserve public memory and consciousness.
- An increasing number of local and national initiatives to commemorate and memorialize spaces that no longer exist, such as the former New York Slave Market in lower Manhattan, where enslaved African Americans and Native Americans were hired or purchased.

² Cooper, Helene. "Grim History Traced in Sunken Slave Ship Found off South Africa." The New York Times, 31 May 2015. Web. 01 June 2015.

These projects serve as a sign of the societal shift in consciousness toward incorporating more and varied experiences in the historical record. Like the forgoing scholarly institutes and university-based efforts, HHV's proposed website will use multiple points of entry—primary documents, historical vignettes, audio and video clips, linked data, essays, and artwork—to serve the public.

C. Project Format

Facts are not enough. Story is where it begins. It sticks with people more when it comes from a place of empathy. – Azie M. Dungey, April 2015

The project corresponds to HHV's mission, expertise, and strategic goal to use **digital storytelling as a means** to convey the interpretive themes of our historic sites. For more than 12 years, interpreters at Philipsburg Manor have been sharing with visitors the story of slavery and resistance in the colonial North, focusing on the enslaved individuals who lived and worked on this 18th-century provisioning plantation. However, the physical location limits audience reach, and time constrains the onsite experience. Similarly, the implied authority of live interpretation can, at times, hinder visitor inquiry that leads to deeper understanding.

Slavery in the North will employ innovative digital storytelling and web design to share knowledge, add context, provide platforms for user-generated content, and offer meaningful interactive experiences for users. In so doing, it aims to address the ongoing challenge of broad audience engagement. As HHV has found through years of experience conducting public tours, school programs, and special events, multiple factors have shifted the way museums and historic sites across the nation view audience engagement including: 1) increased challenges in attracting onsite audiences; 2) growing public preference for interactive and self-guided experiences; and 3) the prevalent use of digital, mobile, and transmedia strategies to engage, connect, and share. For the past decade, HHV has been addressing these challenges through the presentation of popular events and, more recently, through the development of digital programs. As such, we have been able to thrive and build a far-reaching constituency—270,000 annual onsite visitors³ and 1 million annual web visitors. Strengthened by our reach and decades of experience, HHV is positioned to develop an interactive website that engages the public with a vital piece of American history. The website's objectives are to:

- Provide an understanding of slavery in the colonial North.
 - Explore the human dimensions of enslavement, as opposed to the institution, as a means to encourage empathy for the individual.
 - o Help give recognition to the enslaved, for whom little physical evidence remains.
- Use specific entry points (1750 probate inventory, runaway slave ads, slave narratives, shipping records, legal documents, etc.) to key humanities themes.
- Bring together content from disparate locations, providing an experience beyond a traditional site visit.
 - o Present Philipsburg Manor as the primary case study.
 - o Apply historical interpretive techniques to create individual stories and experiences of enslaved communities from various northern sites using the limited information available in extant sources.
 - o Be a valuable resource for teachers and students.
- Encourage visits and promote public programs at Philipsburg and other historic sites.

To ensure an optimal user experience, the website employs the following interactive storytelling approach:

- Use the homepage as a start page, not a gateway with menus.
- Break longer stories into numbered chapters to motivate longer-term engagement and set expectations.
- Indicate <u>lengths of content</u> to help visitors select what they have time for.
- Allow visitors to advance, skip, go back ... while keeping the order/sequence clear.
- Allow for additional layers of exploration beyond basic narrative outline.
- No dead ends—but reserve links out to other sites as secondary or tertiary.
- Present narrative from <u>different vantage points</u>.
- Use the Inzovu Curve⁴ to help us <u>reach the outcomes we want in our audiences and help them manage</u> their emotional reactions to the content.

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³ Of HHV's total annual visitorship of 270,000 at our six historic sites, Philipsburg Manor accounts for 60,000 annual visitors.

⁴ "The Inzovu Curve." *Inzovu Curve*. UX for Good, 2015. Web. 08 April 2015.

Users will be able to explore content through the multiple chapters, which correspond to the project's humanities themes. Tentatively titled, these chapters are: 1) There were slaves in the North?; 2) Why slavery?; 3) Why Africa?; 4) What did it mean to be a slave?; 5) What choices did they have?; 6) When did slavery end in the North?; and 7) What is the legacy of slavery? Currently, the names of these chapters are deliberately simple and accessible, so as to incite curiosity and action (i.e., clicking through, sharing) among a general audience. Also, the website is designed to accommodate varying degrees of knowledge, interest, and attention. For shorter visits, users will be introduced to the top-level content of each chapter through simple content types such as: text overviews, short videos and audio clips, slide shows, myth-busters, did-you-knows, quotes, data-graphics and statistics, and polls. For longer, self-guided journeys, users can go deeper on subtopics and more complex content types such as longer narratives, videos in chapters, interactive features, comparisons, visitor commentary, and opinion pieces. Cross-navigation will be a vital usability function of the website. In addition to preventing dead ends, it allows users to toggle between related, non-sequential topics and subtopics, which will increase their online engagement time.

Existing projects that use formats or technology similar to what HHV proposes include: <u>Some Were Neighbors</u> (C&G Partners) by the United States Holocaust Memorial Museum, a provocative website that integrates linked first-person narrative, historical images with tagged metadata, video to complement the museum exhibition, resources for educators, a robust image gallery, and multiple opportunities for users to reflect upon and share content; and <u>The Hollow</u>, (McMillion, Soyk) a groundbreaking interactive documentary centered on the rise and fall of McDowell County, WV. Unlike a traditional documentary, viewers of <u>The Hollow</u> must scroll and click through a detailed multi-storyline experience that evokes the plight of hundreds of economically depressed American towns and counties. Its multi-media platform, which weaves together historical images and footage, audio clips, an interactive timeline, news clippings, data graphics, and a chilling score, serves as a model to which *Slavery in the North* aspires.

D. Audience and Distribution

The website will reach a wide audience in diverse segments including HHV's onsite visitors to Philipsburg Manor, our vast online audience (1 million annual visitors), adult learners interested in diving deeper into the history of Philipsburg Manor and the legacy of northern colonial enslavement and resistance, and students and educators. Each year, some 60,000 people visit Philipsburg for site tours, school programs, teacher training workshops, and popular cultural events. Another 30,000 annual visitors to Kykuit, the Rockefeller Estate, pass through the shared visitor center at Philipsburg Manor, where they encounter HHV's orientation exhibit, *Slavery and Resistance in the Hudson Valley*. HHV conducts ongoing formal audience research and analyzes visitation statistics to best meet the needs of our beneficiaries. Our typical visitor group is comprised of parents ages 35-50 with children under 10. Not surprisingly, HHV's audience is web and social media savvy, with 81% of survey respondents in 2014 identifying as regular or occasional Facebook users, 62% identifying as regular or occasional Pinterest users.

But, as HHV established in Discovery, demographic and survey data provide only a partial view of our audience. To ensure effective engagement and optimal user experiences, we have defined four personas for the website. Personas are fictional, generalized characters that embody the diverse needs, goals, and behaviors of our existing and potential visitors. The targeted personas are: 1) Culture Seeker; 2) Teacher; 3) Popular Culture Visitor; and 4) 7th-8th Grade Student. The attached design document provides a detailed profile for each persona including learning behaviors and expectations, level of interest in history, ability to focus, device and sharing preferences, and frequency of museum and historic site visits. Each persona also comes with a specific set of challenges and intended outcomes when visiting *Slavery in the North*.

In terms of distribution, the website has the potential to garner unlimited users, regardless of location. It will receive high visibility onsite and online, and will be a focal point of HHV's communication efforts locally, regionally, and nationally. Our staff members regularly present at professional conferences, such as those organized by the Museum Association of New York and the American Alliance of Museums, and we intend to make the *Slavery in the North* project a centerpiece of our upcoming speaking engagements. Individuals across the country will be able to access the website via a link on HHV's website. HHV was an early, aggressive adopter of social media. Our digital-savvy in-house Marketing, Public Relations and New Media Department, comprised of two full-time staff members augmented by key outside vendors, uses social

and electronic media to connect with, dialogue with, and ultimately grow our audience. HHV has more than 53,000 Facebook fans and 6,000 Twitter followers. Additionally, we have some 100,000 email addresses collected from ticket buyers, members, and e-newsletter subscribers. HHV's overall engagement rate of 25% on our email campaigns demonstrates how powerful this direct marketing tool has become for HHV, despite increasing inbox saturation in the media marketplace.

To reach educators and students, HHV will also provide a link to the website on heavily-trafficked portals such as the National Council on the Humanities, National Council for the Social Studies, and related sites. As part of our overall web optimization strategy, HHV employs sophisticated SEO techniques to capture relevant traffic. These techniques will help to raise the profile of the website and its layered content. In addition to featuring Slavery in the North on our own podcast, HHV will pitch the project to the editors of American history-themed podcasts such as Stuff You Missed in History Class, American Experience (PBS), and Footnoting History. Because HHV's initiatives dovetail with partner institutions including Colonial Williamsburg, National Museum of African American History and Culture, New York Public Library, and Schomburg Center for Research in Black Culture, HHV will work with their communications teams to promote Slavery in the North resources on their webpages and social media channels. We will also microtarget audiences via Google AdWords, Twitter, and Facebook Sponsored Stories and Promoted Posts.

E. Project Evaluation

Continuing the longstanding practice of embedding evaluation into development and practice, HHV will leverage the insights gleaned during Discovery by re-engaging independent evaluator Kate Tinworth (Founder and Principal, Expose Your Museum LLC) in the Prototyping phase. Ms. Tinworth will work closely with the HHV project team and design firm C&G Partners to lead usability testing of an early rendition of the prototype (a static click-through sequence of a limited number of full-visual designed screens) focusing on two of the four targeted personas: Culture Seeker and Popular Culture Visitor. Focusing on these two personas represents opposite ends of the engagement spectrum and will provide a nuanced understanding of use. Students and teachers—both distinct and complex user groups—are anticipated to be the focus of later phases of the project. Usability testing will accomplish multiple goals: 1) to assess whether learning, engagement, and empathy are present for participants; 2) to evaluate the four humanities themes for the website (economic development; property not person; resistance and personal volition; manumission not equal to equality); and 3) to determine if and how the site structure is intuitive and clear for primary users. This combines traditional usability testing with content evaluation, providing both HHV and C&G Partners key information to inform decision-making and next steps. The prototype will be tested in four distinct communities to assess a range of responses: Hudson Valley, NY; New York City, NY; New Haven and/or Hartford, CT; and Durham and/or Chapel Hill, NC (where ExposeYourMuseum is headquartered). This is particularly important due to the site's intended wide geographic reach. A target sample size of two Culture Seekers and two Popular Culture Visitors is set for each community (a total of 16 tests). Following usability testing, ExposeYourMuseum will analyze and summarize results and devise a list of actionable recommendations for the final prototype.

F. Rights, Permissions, and Licensing

HHV's research library contains invaluable resources for *Slavery in the North*. The library collection contains the **Philipse Family Papers**, including receipts, letters, bonds, leases, legal papers, rent rolls, maps, deeds, and wills. A number of these documents contain vital clues to understanding enslavement at Philipsburg and in the region, as well as references to acts of resistance and the conditions that motivated such actions. These documents, as well as extensive materials in the **Corporate Records** (including research reports, memoranda, and letters dating to early American and European research surveys for Philipsburg and the Philipse family, augmented by research reports conducted for the reinterpretation) provide the foundational material for this project. **Documents and historic images** will be gathered from the New-York Historical Society, New York Public Library, Columbia University, the Library of Congress, the New York State Archives, the New York State Museum, and Winterthur, with appropriate permissions obtained. Microfilm versions of the colonial-era **runaway newspaper ads**, vital primary sources for this project, are found in the collections of the sister organizations listed above. Although the advert text is in the public domain, permissions will be obtained for images of original source material. Together with C&G Partners and our digital media advisors, HHV will

analyze website platform options and identify additional **technologies** needed best to convey the project's humanities themes and enable user-friendly interaction.

G. Humanities Advisors

For the Prototyping phase, which will rely heavily on outside expertise in digital storytelling, transmedia, digital humanities, and interactive educational technology, HHV has secured the commitment of new scholars. These advisors, along with four veteran scholars from Discovery, will convene at HHV's library and headquarters in the spring of 2016. Following a tour of Philipsburg (offered to both new and returning scholars), they will review an early version of the website prototype (a static click-through sequence of a limited number of full-visual designed screens). They will assess the website in terms of its usability, navigation, interactivity, content presentation, and adherence to the humanities themes. The advisors will also review HHV's research results and content development to date and provide recommendations for Production.

Ana Lucia Araujo, Ph.D., Professor of History and Director of Graduate Studies in the Department of History at Howard University. Dr. Araujo's work explores the history and the memory of the Atlantic slave trade and slavery and their social and cultural legacies. In the last 10 years, she has published three monographs, four edited books, one co-edited book, and several articles and book chapters published in English, French, Portuguese, and Spanish. Dr. Araujo is the editor of the book series *Slavery: Past and Present* at Cambria Press and the creator of the website *A Historian's Views: Digital Humanities and Arts in the Age of Presentism. Dr. Araujo was a valuable addition to the Discovery phase. Her focus on public memory, heritage, and the visual culture of slavery will continue to guide our storytelling approaching in Prototyping.*

Kevin Clark, Ph.D., Professor in the Division of Learning Technologies, and Founding Director of the Center for Digital Media Innovation and Diversity in the College of Education and Human Development at George Mason University. Dr. Clark has extensive experience as a designer and consultant in the areas of educational game design, online and interactive media, and issues of diversity and inclusion in digital media. His recent publications include *Culture Learning and Technology: Research and Practice* (Routledge Publishing, 2014), and *Emotions and Technology: Communication of Feelings for, with and through Digital Media*. (Elsevier Publishing Company, 2014). *Dr. Clark's prolific research and direct experience designing and developing educational interactive media for diverse audiences will inform the project in a significant way.*

Leslie M. Harris, Ph.D., Associate Professor of History and African American Studies, Emory University. Dr. Harris's research focuses on the history of pre-Civil War African Americans in the U.S. She is the author of *In the Shadow of Slavery: African Americans in New York City, 1626-1863* (University of Chicago Press, 2003), which challenged the prevailing view of slavery as a phenomenon of the South with little impact in the North. She advised the New-York Historical Society's *Slavery in New York* exhibit and co-edited the accompanying book. She co-founded and directed Emory's Transforming Community Project, which encourages reflective, fact-driven engagement with the University's history and experiences of race, gender, and sexuality. *Dr. Harris's knowledge of slavery in New York, combined with her experience dealing with sensitive topics, will help HHV prioritize and present content on the website prototype.*

Adeline Koh, Ph.D., Associate Professor of Literature and Director, South Jersey Center for the Digital Humanities, Stockton University. Dr. Koh works on the intersections between postcolonial studies and the digital humanities, 19th-21st century British and Anglophone literature, Southeast Asian and African studies, and games in higher education. She directs *Digitizing 'Chinese Englishmen,'* a digital archival project on 19th-century 'Asian Victorians' in Southeast Asia, and is the designer of *Trading Races*, an elaborate historical role-playing game designed to teach race consciousness in the undergraduate classroom. She is also a core contributor to the "Profhacker Column" at the *Chronicle of Higher Education. HHV selected Dr. Koh for her diverse background in digital humanities, digital pedagogy, and web design—combined with her experience with issues of race and ethnicity.*

Jeffrey W. McClurken, Ph.D., Professor of History and American Studies, Special Assistant to the Provost for Teaching, Technology, and Innovation, University of Mary Washington. Dr. McClurken's expertise exists at the intersection of American history (including the history of slavery), teaching, and technology. He has authored numerous chapters and articles in publications including *A Different Kind of Web: New Connections between Archives and Our Users* (Chicago: Society of American Archivists, 2011) and *Learning through Digital Media: Experiments in Technology and Pedagogy* (New York: The New School and the MacArthur

Foundation, 2011). Although Dr. McClurken was unable to attend the scholars' meeting in April, he provided invaluable feedback remotely to the design document. As a suitable match to Dr. Clark and Dr. Koh, he will contribute knowledge pertaining to web content, student engagement, and teaching through digital media.

Felicia Pride, Writer and Producer, Founder of The Pride Collaborative. During her 15 years of working in media, Ms. Pride has produced large-scale media projects; developed and executed comprehensive engagement plans and content strategy for projects and campaigns; spearheaded the development of web, media, and content initiatives; and helped to build physical and digital communities. She has worked on transmedia projects with organizations including PBS, Participant Media, and NPR, and has developed multimedia content and engagement initiatives for award-winning films including *Slavery by Another Name*, *Middle of Nowhere*, and *Alice Walker: Beauty in Truth*. Ms. Pride is the author of seven books; her most recent, *To Create*, is a collection of interviews with black storytellers and media makers. *Ms. Pride carries a remarkable background in creative humanities work, strong multi-platform experience, and audience development, which will help drive our audience engagement and outreach strategy for the project.*

Jacqueline A. Simmons, Ed.D., Lecturer, Department of Curriculum and Teaching at Teachers College, Columbia University. Dr. Simmons teaches graduate courses on curriculum theory and history, teaching and learning, and curriculum design. She advises a range of institutions and leads a creative team for Project Innovation, a web-based toolkit commissioned by The Rockefeller Foundation to teach the research, creative facilitation, and collaboration skills needed to effect social change. *In addition to developing the Common Core-aligned curriculum for Runaway Art (as part of the NYCT-funded project), Dr. Simmons skillfully moderated the convening of scholars in Discovery. In Prototyping, she will continue her expanded role as Meeting Facilitator and Moderator to guide the group discussions and stoke further inquiry and analysis.*

Craig S. Wilder, Ph.D., Professor of History, Head of History Faculty, Massachusetts Institute of Technology. Dr. Wilder specializes in American urban, intellectual, and cultural history. He has authored the books *Ebony & Ivy: Race, Slavery, and the Troubled History of America's Universities* (Bloomsbury, 2013) and *In the Company of Black Men: The African Influence on African American Culture in New York City* (New York University Press, 2001/2004), among others. He has advised historical documentaries as well as exhibits at regional and national museums including the New-York Historical Society, Chicago History Museum, and Weeksville Heritage Center. *HHV selected Dr. Wilder for his historical background, his experience planning and implementing historical exhibitions, and his familiarity with documentary-style content. In addition, he will assist in the treatment of filmed historical vignettes and other media.*

H. Production Team

Working in tandem with C&G Partners, HHV's African American Advisory Board, our humanities advisors, and evaluator, the individuals below are responsible for co-curating the website, prioritizing content, guiding our interactive and digital storytelling strategy, and driving the project to successful completion.

Public Historian and Content Consultant (résumé and letter of commitment attached):

Laura M. Chmielewski, Ph.D., Associate Professor of History at Purchase College, State University of New York. Dr. Chmielewski brings 20+ year of academic experience specializing in Early American and Atlantic World history. She has deep knowledge of the history of Philipsburg, developed through site visits with her students and having worked on consulting projects for HHV. A former historic site director, Dr. Chmielewski writes and lectures on Early American history topics including colonial slavery and transatlantic trade. For this project, she will continue to help shape the user experience, conduct research, and develop content.

Historic Hudson Valley Staff (résumés attached):

Ross W. Higgins (Project Director), Director of Digital Programs: BA, French, Skidmore College. Ms. Higgins directs the design and implementation of all digital programs for HHV. She also oversees the library, archive, and curatorial functions, especially as they relate to presenting digital experiences. A member of HHV's senior management team for 20 years, Ms. Higgins played a key role in the Philipsburg reinterpretation and was instrumental in the planning of public and educational programs in her former position as Director of Programs. She oversaw the completion of three digital humanities projects related to the NEH-funded reinterpretation of Montgomery Place, as well as the Discovery phase of this current project.

Michael A. Lord, Associate Director of Education: BA, History and Black Studies, Amherst College. Mr. Lord came to HHV in 1998 to help lead the reinterpretation of Philipsburg, creating and implementing a new interpretive plan for the site. He has since served in other capacities including Site Manager of Washington Irving's Sunnyside. Prior to HHV, Mr. Lord worked in the African American Programs department of Colonial Williamsburg, where he interpreted the "Slave Quarters" at Carter's Grove, led tours focusing on enslavement in colonial Virginia, managed and acted in museum theater programs, and trained interpreters.

Jessa J. Krick, Collections Manager: MA, The Bard Graduate Center for Studies in the Decorative Arts, Design and Culture; BA, English, Willamette University. Ms. Krick is the senior staff member responsible for HHV's collection of 16,000 objects and serves on the Digital Programs team. She played a key role in the implementation phase of the NEH-funded Montgomery Place reinterpretation, which she discussed as part of an NEH-assembled panel at the annual meeting of the National Council on Public History in March 2014. Ms. Krick also served as the lead for HHV's implementation of Gallery System's eMuseum software.

Karen Walton Morse, C.A., Manager of Library and Archival Services: MSI, Archives and Records Management, University of Michigan; BA, Comparative Literature, University of Chicago. Ms. Morse brings to the project a facility for using archival and manuscript material as the basis for online exhibitions and digital humanities projects. As part of HHV's Digital Programs team, Ms. Morse is also overseeing an IMLS-funded library automation and retrospective conversion project.

Margaret W. Hughes, Education Manager: MAT in Museum Education, George Washington University; BA, American Studies, University of the South. Ms. Hughes works alongside Mr. Lord to develop, deliver, and refine HHV's school programs. Prior to joining HHV in 2014, she served as Director of Education at The Museum at Bethel Woods/Bethel Woods Center for the Arts. In that role, she developed school programs for K-12 audiences, pre- and post-visit materials, and professional development workshops for teachers.

Advisory Board:

The project builds on HHV's foundation of institutional knowledge and deep ties to the community. Our 12-member, all-volunteer **African American Advisory Board** (AAAB), which guided the Philipsburg reinterpretation, oversees all programming at the site. Under the AAAB's guidance, HHV has experimented with a number of innovative youth programs including *Pretends to Be Free* and a museum theater workshop in which students worked from scripted vignettes to portray moments in the lives of enslaved individuals at Philipsburg. The AAAB meets quarterly and will continue to play a key advisory role in this project.

Consulting Vendors (résumés/proposals and letters of commitment attached):

C&G Partners, an award-winning, multi-specialty design studio that has deep expertise in multiple interrelated design fields: brands, exhibits, infographics, interactives, motion, print, signage, and websites. From the United States Holocaust Memorial Museum to The King Center, C&G has extensive experience interpreting sensitive issues from the past and making history meaningful to a variety of audiences. **Kate Tinworth**, Founder and Principal of **Expose Your Museum LLC**, a boutique consultancy delivering the tools and data needed to better understand current and potential visitors, teams, communities, and audiences. Ms. Tinworth's approach prioritizes making connections, facilitating conversations, elevating voices, engaging creatively, and strong, clear communication to inspire innovation, inform strategy, and drive decision-making.

I. State of the Project

The proposed website represents the first significant digital outgrowth of HHV's NEH-funded Philipsburg Manor reinterpretation. While digital means have been used extensively to promote onsite visitation to Philipsburg, only a limited amount of historical content has been made available online, largely through rudimentary efforts like posting on HHV's website sections of printed guidebooks and school program curricula. With the 1997 NEH planning grant, nationally prominent scholars were retained to conduct research that continues to serve as the basis of the presentation of Philipsburg. The 2000 implementation grant made possible a new interpretive plan, as well as interpreter training, the reinstallation of period rooms, the acquisition of reproduction objects for teaching, more accurate period clothing, and a new printed guidebook to the site. As funding has allowed, HHV has since introduced a variety of educational programs at Philipsburg that focus on slavery in the North. These include school-time workshops for K-12 students, afterschool programs for underserved youth, a summer day camp, apprenticeships in wooden boatbuilding and

historic agriculture, and public festivals including Pinkster, a Dutch celebration of spring adapted by African Americans in the 18th-century. And, an orientation exhibition installed in 2011 in the visitor's center focuses on issues of resistance.

Located just 30 miles north of midtown Manhattan, Philipsburg is near four other National Historic Landmarks interpreted by HHV: Washington Irving's Sunnyside, Van Cortlandt Manor, Union Church of Pocantico Hills, and Kykuit, the Rockefeller Estate. Other sites in the area include Lyndhurst (a National Trust site) and the Old Dutch Church of Sleepy Hollow (a 1685 church originally part of the Philipse estate). The Philipsburg Manor visitor's center serves as a Regional Interpretative Center on New York's Underground Railroad Heritage Trail, and the site is on Westchester County's African American Heritage Trail.

Initial planning for *Slavery in the North* began in March 2014. Upon receiving a Discovery grant of \$30,000 from the NEH in December, HHV immediately set to work on this phase. An inter-departmental team from HHV's education, curatorial, library/archive, and digital programs departments began convening once a week to strategize and shape the project. Importantly, two members of this team (along with HHV's President, Waddell Stillman) were involved in the Philipsburg reinterpretation, providing vital continuity. Beginning in February 2015, HHV has corresponded and met regularly with C&G Partners. The firm has proved to be a stealthy and proactive partner and was instrumental in creating the design document, which underwent more than a dozen revisions. Lastly, members of HHV's AAAB have been devoting significant time to the project. Of the 12 members of this group, 10 were involved with the launch of the Philipsburg reinterpretation (including one member who has since become HHV's Director of Human Resources).

The April 2015 convening of humanities scholars, media consultants, and AAAB members was rigorous, thought-provoking, and insightful. Dr. Jacqueline Simmons moderated the group discussions and prompted the advisors to tackle difficult questions surrounding northern colonial enslavement, resistance, the human experience of slavery, and how these stories can and should be told online. Evaluator Kate Tinworth observed and participated in the discussions, employing a "critical friend" approach to nudge the group in helpful directions. Following these sessions, the advisors reviewed the draft design document and submitted their edits and comments. Dr. Jeffrey McClurken, who was unable to attend the April meetings, critiqued the design document remotely through joint conference calls with HHV and C&G.

J. Work Plan

Months		JAN 2016			FEB				M	٩R			AP	R				MA	Y			JUN					JUL				AUG		
Weeks	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29 3	30 3	1 32	2 33	34
Kickoff, content briefing																																	
Continuing research, content development																																	
Final sitemap and wireframes																																	
Visual look and feel development																																	
Visual design templates; placeholder photo/video																																	
Tech specifications/requirements																																	
Usability test plans, subject recruitment, scheduling																																	
Usability testing (four locations)																																	
Usability test results, prioritized recommendations																																	
Final tech specifications/requirements																																	
Convening of advisors, review content/prototype																																	
Input from advisors, actionable recommendations																																	
Post-usability test: content, UX/design revisions																																	
HTML5 prototype development																																	
Continuing content development, entry in prototype																																	
Prototype quality assurance																																	
Production phase proposal development																																	
Continuing research, content development																																	
Ongoing design consultation																																	
Ongoing evaluation consultation																																	

K. Organization Profile

Chartered in 1951 by the Board of Regents of the State University of New York as an educational institution, Historic Hudson Valley (FKA Sleepy Hollow Restorations) was created by John D. Rockefeller, Jr., after he founded Colonial Williamsburg. The mission of the organization is to celebrate the history, architecture, landscape, and culture of the Hudson Valley, advancing its importance and thereby assuring its preservation. HHV operates a network of six National Historic Landmark sites along the Hudson River in New York. The sites possess documented historical integrity, architectural distinction, superb decorative and fine arts collections, and exceptional importance of landscape and setting. In addition to Philipsburg Manor, they are:

- Sunnyside, the home of Washington Irving;
- Van Cortlandt Manor, an estate that presents the social, political, and economic life of a prominent Patriot family in the years following the American Revolution;
- Montgomery Place, a vast country estate recently reinterpreted with funding from the NEH to present Americans' changing relationship with nature and landscape;
- Union Church of Pocantico Hills, featuring stained-glass windows by Henri Matisse and Marc Chagall;
- Kykuit, the Rockefeller Estate. Kykuit is a National Trust Historic site that is operated by the Rockefeller Brothers Fund as a center for its philanthropic program. Historic Hudson Valley conducts the visitation program of the house, Coach Barn, and gardens.

HHV is a major contributor to the educational, artistic, environmental, and economic vitality of the region. Upwards of 270,000 people of all ages visit our historic sites each year. In the digital realm, HHV boasts 1 million annual visitors to our website, more than 53,000 Facebook fans, more than 6,000 Twitter followers, and more than 10,000 downloads of our free smartphone apps to Montgomery Place (created with NEH funding) and the Union Church of Pocantico Hills. HHV maintains 53 historic structures; 750 acres of historic landscapes; and a collection of 16,000 objects relating to the history of the region. In 2011, HHV opened the Regional History Center. With our distinguished research library as its centerpiece, the building includes spaces for public programs and meetings, and facilities for staff, researchers, volunteers, and interns. HHV offers a range of public programs designed to appeal to a variety of interests. Included are daily site tours, school-time programs, after-school programs for underserved youth, teacher training workshops, exhibitions, and internships. Seasonal, popular events celebrate the history, culture, and folklore of the region, helping to build traditional museum audiences, attract visitors, and generate economic activity through heritage tourism.

L. Fundraising Plan

Bringing the history and human experience of northern colonial slavery to the digital realm is a major
institutional priority for HHV. As such, it drives a significant portion of our fundraising efforts. Last
December, HHV submitted a proposal to the (b) (4) to support no
film production of HHV's original scripted vignettes including "Trying Times," which would be featured on
the website. If funded, the 60 (4) grant would help to ensure that the Slavery in the North website contains tw
high-quality short films that illustrate the nuanced relationships and power dynamics among the enslaved
community, overseer, and owner of Philipsburg Manor. Also, because the Runaway Art program materials
would be included as a resource on the proposed website, approximately \$10,000 from the New York
Community Trust grant is available to be applied to the Prototyping phase. Additionally, through a
longstanding partnership with the DoubleTree by Hilton in Tarrytown, HHV is able to secure in-kind lodging
for the visiting scholars (b) (4) . HHV would cover salaries and fringe benefits for
staff involved in the project in its 2016 operating budget (\$40,988). And, as we have successfully done in the
past, HHV would use NEH funds to leverage contributions from private donors, such as the (b) (4)
which provided a grant for the Discovery phase. HHV's four-person Development Department is
led by the same Director of Development and President who oversaw fundraising for the NEH-funded
Montgomery Place and Phillipsburg Manor reinterpretation projects. Over the long term, HHV also plans to
approach select individuals from its current donor pool, including: 1) members of the (b) (4)
who make annual gifts (b) (4) and periodically provide
additional support for special projects; and 2) foundation and corporate donors who have provided past
support for the Philipsburg reinterpretation including (b) (4), and the (b) (4), and the
(b) (4)

Historic Hudson Valley

Slavery in the North Website

Discovery Phase: Design Document

Design document table of contents

- 03. Narrative treatment
- 06. User experience:
- 06. Website objectives
- 08. Personas
- 12. Guiding principles
- 13. Website navigation concepts
- 15. High-level information architecture
- 16. Sample user journeys (draft wireframes)
- 29. Technical specifications
- 30. Sustainability plan

NARRATIVE TREATMENT

Introduction

This design document serves as a conceptual framework for a new online interactive documentary focused on the overlooked history of slavery in the colonial North, with an emphasis on individual stories as a means to personalize the past. The humanities themes and related content presented in the following pages are an outgrowth of the National Endowment for the Humanities-funded reinterpretation of Philipsburg Manor, HHV's 26-acre National Historic Landmark in Sleepy Hollow, NY. Grounded in the history of northern colonial slavery (which is the primary interpretive theme at Philipsburg Manor), HHV's proposed website aims to engage the public through multi-media storytelling. Rather than examining the institution of northern colonial slavery, the website will highlight the various enslaved individuals and communities who played a vital role in the building of a nation.

HHV takes seriously its role as <u>interpreter</u> of this history. Because Philipsburg Manor is comparably well documented, HHV has been able to go beneath the surface and explore the identities, skills, family connections, and cultural retention practices among the enslaved population at the site. However, even with this breadth of material, we still only get a partial view of history and must therefore use interpretation to evoke the human experience. The names of the 23 enslaved men, women, and children listed on Adolph Philipse's 1750 probate inventory, as well as runaway slave ads, legal and court documents, slave narratives, and other primary and secondary sources related to Philipsburg Manor and other northern sites,

serve as entry points for exploring the human dimensions of slavery. Philipsburg Manor stands as the primary case study, augmented by additional content representing New York, Connecticut, Massachusetts, New Hampshire, New Jersey, Pennsylvania, and Rhode Island.

The website is driven by *four core humanities themes*, which HHV established in consultation with our African American Advisory Board and humanities advisors:

- 1. Colonial economic development depended upon the enslaved.
- 2. The inhumanity of enslavement stems not from the labor or living conditions, but from the classification of captive Africans as property rather than person.
- 3. Resistance (in its many forms) by slaves was a means of reasserting personal volition.
- 4. Manumission was gradual, not uniformly adopted by the northern states, and did not equal equality.

Audience

The website will reach a wide audience in diverse segments including HHV's onsite visitors to Philipsburg Manor, our vast online audience (1 million annual visitors), adult learners interested in diving deeper into the history of Philipsburg and the legacy of northern colonial slavery and resistance, and students and educators. Each year, some 60,000 people visit Philipsburg for site tours, school programs, teacher training workshops, and popular cultural events. Another

30,000 annual visitors to Kykuit, the Rockefeller Estate, pass through the shared visitor center at Philipsburg. HHV conducts formal audience research and analyzes visitation statistics to best meet the needs of our beneficiaries. But, as HHV established in Discovery, demographic and survey data provide only a partial view of our audience. To ensure effective engagement and optimal user experiences, we have defined four personas for the new website: Culture Seeker; Teacher; Popular Culture Visitor; and 7th-8th Grade Student. This design document provides a detailed profile for each persona including learning behaviors, level of interest in history, ability to focus, device and sharing preferences, frequency of historic site visits, and potential challenges and outcomes.

Humanities Themes and Related Features

1. Colonial economic development depended upon the enslaved.

Throughout the northern colonies, both the labor of the enslaved and the establishment of the transatlantic slave trade proved to be vital to the region's developing economy. From the fertile valley of the Hudson River to the shorelines of Long Island, provisioning plantations used enslaved labor to produce staple foods for export to the sugar islands of Barbados and Curacao. New England merchants established profitable trade routes delivering human cargo from Africa to the West Indies in exchange for molasses, distilled into rum in refineries along the New England coast, and shipped back to the West African coast in exchange for more captive Africans. The nature of northern agriculture combined with the

NARRATIVE TREATMENT (cont.)

growth of commercial enterprises such as Philipsburg Manor gave rise to a work force that included a high proportion of African American artisans skilled in different trades—such as Caesar, the enslaved miller of Philipsburg Manor, whose weekly output of 30,000 pounds of flour is valuated on page 19 of this document. In addition to flour, visitors to the new website will be able to scroll through an interactive slideshow featuring other provisions that helped to fuel the colonial economy such as butter, hard tack, and salted meats. By highlighting Caesar and the thousands of other enslaved workers in the colonial North, the website aims to recognize the vast number of enslaved people who played a crucial role in building America's economy.

2. The inhumanity of enslavement stems not from the labor or living conditions, but from the classification of captive Africans as property rather than person.

In late January 1750, an "Inventory of all and Singular the goods, Rights Chattels & Credits of the Estate of Mr. Adolph Philipse Deceased" was undertaken. Included in the four pages of "movable property" at the Upper Mills, alongside the cattle, horses, and silverware, were the names of 23 enslaved men, women, and children. The "negro property" included the skilled laborers required to run a milling operation, several farmers on the site, a small domestic staff, eight young children and several "men not fitt for work." One of the young children listed on the inventory was an eight-year-old boy named Sam. On April 19, 1750, Sam was sold for £62 to Abraham DePeyster at public vendue. His father, Sampson, was also enslaved at Philipsburg Manor and had been sold a few weeks before to Lawrence Cortwright for £75.

The forced dissolution of families, as seen in the separate sales of Sampson and his son, Sam, illustrates the human tragedy of enslavement—that slaves were treated as property rather than person. Visitors to the website will encounter this theme through multiple pieces of content, from Adolph Philipse's 1750 probate inventory to printed notices of public auctions to receipts of human sale. For example, as described on page 20, an interactive document feature will allow users to explore these resources in depth by "flipping over," swiping, and zooming. Where appropriate, interactive hotspots on the documents will reveal pop-ups with details related to the enslaved individuals. Users will also be able to compare historical documents to their modern-day equivalent, such as: probate inventory v. last will and testament; letter of ownership v. birth certificate; and slave pass v. passport.

3. Resistance (in its many forms) by slaves was a means of reasserting personal volition.

Visitors to the new website will also discover that individuals coped with enslavement through a complex range of responses. The retention of African cultural practices and the struggle to build and maintain families also countered the dehumanizing aspects of bondage. Such cultural retention is evident in the survival of African names, language, music, and rituals such as Pinkster, a traditional African American celebration of spring. As depicted in "Trying Times," one of HHV's original pieces of historical fiction that will be presented online, enslaved Africans also developed survival skills such as covertly threatening a work slowdown, feigning illness or ignorance, or even sabotaging equipment. More overt

methods for fighting the system included running away (or "stealing oneself" as Frederick Douglass termed it) and open rebellion such as the 1741 slave insurrection, as depicted by Cuffee, Adolph Philipse's enslaved man who was implicated in the "Great Negro Plot" to burn New York City.

Although every act of resistance has its own story, there is much to be learned from "stealing oneself." The hundreds of runaway ads printed in colonial newspapers provide us with a wealth of knowledge about enslaved individuals and their community. The ads show evidence of ongoing, active resistance by individuals against the institution of slavery and give us a glimpse into the physical appearance, skills, education, and personalities of those who chose to run. The website will not only feature these ads but it will also help users "read between the lines" to understand the choices made by real people. For example, page 26 includes a segment on Nell, a real enslaved woman who, in 1753, ran away from Isaac Kingsland of Bergen County, NJ.

4. Manumission was gradual, not uniformly adopted by the northern states, and did not equal equality.

The website will also convey the fact that manumission took many forms in the northern states. Most northern states adopted a gradual manumission that ensured slave owners a period of 18-28 years to determine how to divest themselves of their human property. Pennsylvania's 1780 legislative "Act for the Gradual Abolition of Slavery" set the standard for most northern states. Any person born in Pennsylvania after March 1, 1780 was born free. Those enslaved in Pennsylvania before

NARRATIVE TREATMENT (cont.)

the 1780 law went into effect, however, remained enslaved for life. It wasn't until 1847 that another act of the legislature declared all Pennsylvanians free. Over the next four years, Rhode Island, Connecticut, and New Hampshire all passed similar bills for gradual abolition. The process of complete abolition, however, took decades. New York eventually abolished slavery for all in 1827, and New Jersey did not fully abolish slavery until it ratified the 13th amendment in 1865. Massachusetts was the only state to end enslavement by a ruling of the state's Supreme Court. By examining this history and depicting it through an interactive timeline, HHV's project aims to provide further insight into the legacy of racebased slavery and its impact on contemporary issues of discrimination and inequality.

User Experience

Users will be able to explore the project's historical and interpretive content through multiple chapters, which correspond to the project's humanities themes. Tentatively titled, these chapters are: There were slaves in the North?; Why slavery?; Why Africa?; What did it mean to be a slave?; What choices did they have?; When did slavery end in the North?; What is the legacy of slavery? Currently, the names of these chapters are deliberately simple and accessible, so as to incite curiosity and action among a general audience. Also, the website will accommodate varying degrees of knowledge, interest, and attention. For shorter visits, users will be introduced to the top-level content of each chapter through simple content types such as: text

overviews, short videos and audio clips, slide shows, myth-busters, did-you-knows, quotes, data-graphics and statistics, and polls. For longer, self-guided journeys, users can go deeper on subtopics and more complex content types such as longer narratives, videos in chapters, interactive features, comparisons, visitor commentary, and opinion pieces. Cross-navigation will be a vital usability function of the website. In addition to preventing dead ends, it allows users to toggle between related, non-sequential topics and subtopics, which will increase their online engagement time.

User-Generated Content

The website will include multiple opportunities for usergenerated content including, as appropriate, the creation of content-related text and images, website reviews, FAQs, hashtags, discussions, and social media conversations that pertain to the humanities content. Users will be invited to respond to pieces of content and answer specific questions posted on the site such as: What is your reaction? or What would you do? Both onsite and virtual visitors will be able to post commentary about their experiences and what they learned about northern enslavement and resistance.

All user-generated content will be carefully vetted and monitored by HHV's Digital Programs Department. Webpages will contain a link to HHV's social media policy, which states that HHV will judiciously moderate comments and other user-generated content. HHV will either reject or delete submissions that: incite, promote, or encourage criminal activities; contain

pornography, solicitation, defamatory, or sexually explicit material; contain obscene, defamatory or threatening language or discrimination based on race, sex, gender, religion, national origin, age, or disability; promote services or products (not including noncommercial links that are relevant to the topic); include any private or sensitive information (i.e. phone numbers, email, or postal addresses); promote or advertise a business or commercial transaction; promote or oppose any person campaigning for election to a political office; post material that violates copyright, trademarks, or intellectual property of others. Users will be encouraged to post or submit their own content, including photographs and videos, pursuant to the standards and terms of use articulated in the policy if they pertain to the subject matter of the project. Users may post only their own, original content. Reproduced or borrowed content that appears to violate third party rights may be deleted.

- Provide an understanding of slavery in the colonial North.
 - Explore the human dimensions of enslavement, as opposed to the institutional side, as a means to encourage empathy for the individual.
 - Help give voice to the enslaved, for whom little physical evidence remains.
- Use specific entry points to key humanities themes.
- Bring together content from disparate locations, providing an experience above and beyond a traditional site visit.
 - Present **Philipsburg Manor** as the primary case study.
 - Apply historical interpretive techniques to create individual stories and experiences of enslaved communities from various northern sites from the limited information available in extant primary sources.
 - Be a valuable resource for teachers and students.
- Encourage historic site visits and promote public programs at Philipsburg Manor and others in the field.

Runaway Art Program

Showcase student art in our narratives

Provide program info

Social media

Facilitate sharing

Provide links to related social media properties

CONTENT PRIORITY









Lesson plans

Provide lesson plan info

Download lesson plans

Link to contact for more info/training

Promote the success of lesson plans

Interactive documentary

Provide an understanding of slavery in the colonial north

Explore the human dimensions of enslavement (voices, names and faces)

> Present Philipsburg Manor as the primary case study

> > Provide an experience and content beyond the historic site visit

Partners

Provide links to partner content

About

Provide general intro to HHV and link to more info

Link to contact us

Credits

List of website credits

Terms of use

Provide legal disclaimers

Copyright

Additional resources

Provide access to look up general information and download digital assets via an asset gallery, timeline, glossary, bibliography, related links

Philipsburg Manor Historic Site

Provide intro to the site

Link to practical visitor info

Provide intro to school site programs / reservations

Events

Provide information on related events

Link to learn more

Link to purchase tickets

Giving

Provide info about ways to give

Link to make a donation

Link to membership



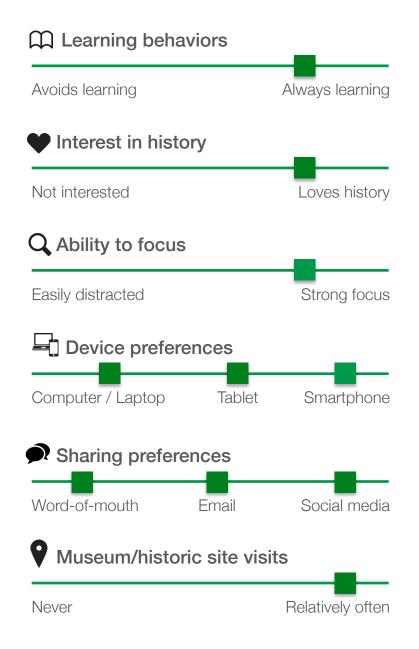




She reads about a cultural topic related to slavery in the colonial North in the NY Times Metro Section or WNYC.

She links to our landing page from an online article.

"Culture Seeker"

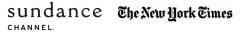


















BEHAVIORS and WANTS

- Values learning and opportunities to go deeper into content and learn new things
- Wants to know about local/regional and personal history (genealogy)
- Likes to feel authenticity and power of place
- Wants to do things leading to introspection, growth, and better living
- May be connector to like-minded groups
- Avid reader and may be writer, blogger, potential advocate of our content
- Plans/researches for travel and road trips
- Often visits museums/historic sites in couples or adult groups, without purchasing tickets in advance

PAINPOINTS and CHALLENGES

- Time dedicated to learning history is eclipsed by understanding current news
- May think they already know about slavery and this is just more of the same
- Don't know about the site/website

WEBSITE VISIT OUTCOMES

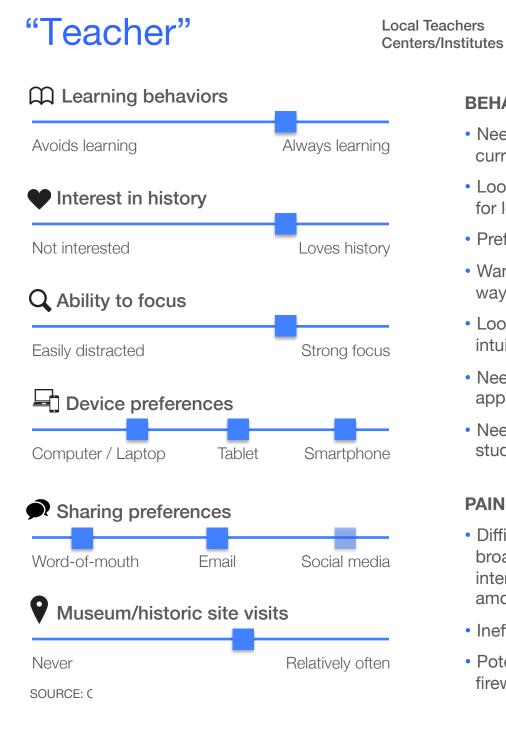
- Spend some time to understand and learn our content
- Make meaningful connections with the past ("a-ha!" moments)
- Develop empathy for the individuals depicted
- Contribute thoughts and knowledge about the content
- Re-tell our stories with accuracy
- Share—at least by email and/or wordof-mouth
- Make a donation
- Locals/travelers:
 - Visit the historic site
 - Attend events
 - Become a member



Teacher
More time/attention

He searches Google for reliable content sources for lesson plans related to local NY State history for 7th graders.

He clicks on the sublink "For Teachers" in our structured Google search results.



BEHAVIORS and WANTS

engage^{ny}

- Needs to comply with local history curriculum standards
- Looks for primary/reliable content sources for lesson plans
- Prefers video or visual content for class
- Wants to communicate with students in the way they do outside of class
- Looks for student-friendly websites inviting intuitive exploration
- Needs clear themes and categorization applied to content
- Needs to know content as appropriate for student age groups

PAINPOINTS and CHALLENGES

- Difficulty balancing curriculum to meet broad standards while being able to focus intensely on certain themes for longer amounts of time
- Ineffective website searches waste time
- Potentially, websites are blocked via firewalls or school restrictions

WEBSITE VISIT OUTCOMES

PBS npr sundance The New York Times f

- Find content for their own lesson plans
- Find lesson plans already provided and understand their effectiveness
- Find out how to get lesson training or more information for teachers
- Print content to hand out in class
- Know that students can visit the website on their own and get more info if they wish
- Pose thought-provoking questions to students instead of solely conveying information
- Relate subject matter to current events for their students
- Save website content bookmarking a page, emailing links to colleagues, etc.
- Local/regional schools: Contact HHV to reserve and bring class to historic site for field trip





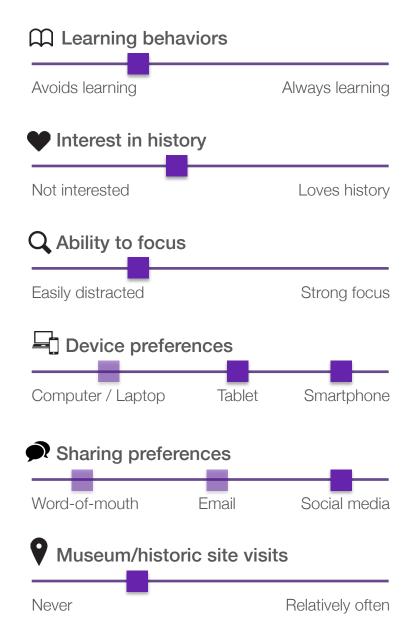


She receives a periodic email from Historic Hudson Valley (this one promoting the Pinkster Festival), which includes a thought-provoking "did-you-know" about slavery in the North.

She taps to learn more.

Her social media post, generated from her website visit, in turn influences her peers to visit the website.

"Popular Culture Visitor"























BEHAVIORS and WANTS

- Wants to be entertained or have something exciting/special to do
- · Attends events that are more entertaining than educational
- Consumes "historical" recreations
- Often needs kid-friendly content and quick activities to fill boredom moments
- Discovers new content via social media. forums, mailing lists, and mommy blogs
- Online ticket buyer
- May go to web after visit for more info
- May grow to become a "culture seeker"

PAINPOINTS and CHALLENGES

- · This content is too hard to face or "depressing"
- The past is not as interesting as the present; History is boring
- Too busy to fit in more things in the day
- Distracted by "second screens"

WEBSITE VISIT OUTCOMES

- Develop empathy for individuals depicted to engage emotionally
- Make meaningful connections with the past ("a-ha!" moments)
- Reflect on content and then contribute emotions and thoughts
- Share thoughts and feelings about impactful, memorable content
- Influence friends via social media posts to visit the website
- Locals/travelers:
 - Visit the historic site
 - Attend events







He is instructed by his teacher to go to our website to prepare homework.

He types in our URL.

His social media post, generated from his website visit, in turn influences his friends to visit the website.

"7-8th Grade Student" (secondarily 4-5th grade)







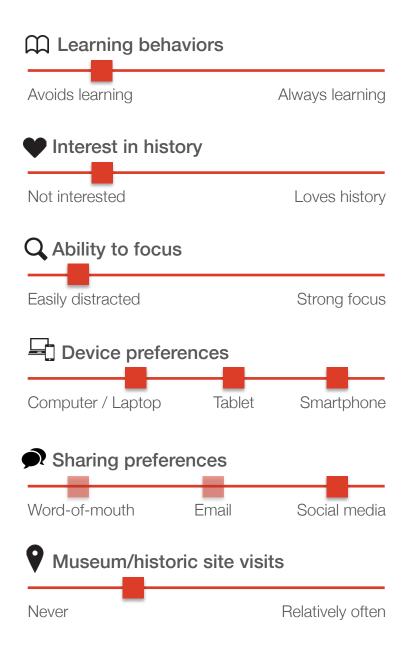












BEHAVIORS and WANTS

- Ever-connected/distracted by technology
- · Generally lacks situational awareness, is oblivious to surroundings
- Prefers 3D renderings over flat
- Relates to characters of their own age range
- Realist—doesn't believe "too happy" or too emotional stories
- Communicates in symbols such as Emoji
- Has an entrepreneurial spirit and desire to change the world
- The most tolerant generation ever
- · Discovers new content via social media (peers) and if parents/teachers tell them
- Gets involved in manual activities on site that are authentic, from a different time

PAINPOINTS and CHALLENGES

- "8-second attention span"
- · Needs to relate to the past in a real, presentday world setting
- Prefers anonymous and ephemeral communication tools

WEBSITE VISIT OUTCOMES

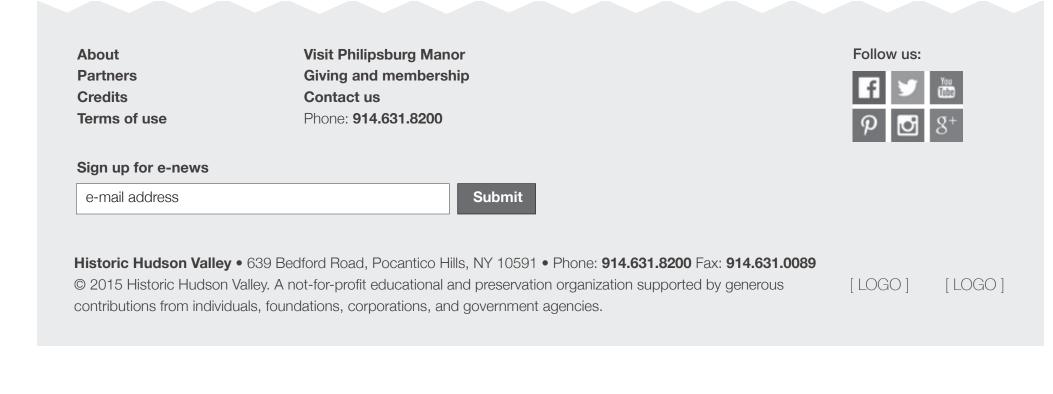
- Complete lesson plans, write essay, create related artwork
- Develop empathy for individuals depicted to engage emotionally
- Make meaningful connections with the past ("a-ha!" moments)
- Share thoughts and feelings about impactful content (especially Runaway Art program content)
- Reflect on the content and remember something about it
- Share their feelings and thoughts about what they experienced or learned
- Locals:
 - Send URL or ask parent/ teacher to take them to visit the historic site

- Focus on individuals and humanity to interpret issues and events
 - Create a narrative-driven experience
 - Elicit universal emotion to aid learning and memory
 - Draw connections to visitors' lives
 - Be contemporary, yet evocative
- Provide user-chosen paths/various entry points to content and information
- Design for various visit durations/attention spans (short-medium-long)
- Start simple and add progressive depth, detail, and richness
- Teach how to read between the lines of primary sources
- Be authentic, accurate, and professional
- Differentiate and innovate where possible and appropriate

Main menu: Global screen to access any entry point at any time.



Footer: Access to global information at the bottom of every screen.



Short visits:

Brief guided narrations introduce top-level content of each chapter in sequential order through simple content types such as:

- Text overviews
- Short videos / audio clips
- Slide shows
- Myth-busters
- Did-you-knows
- Quotes
- Datagraphics / Statistics
- Polls

Longer visits:

Self-guided exploration leads to progressive depth into subtopics, presented in more complex content types, such as:

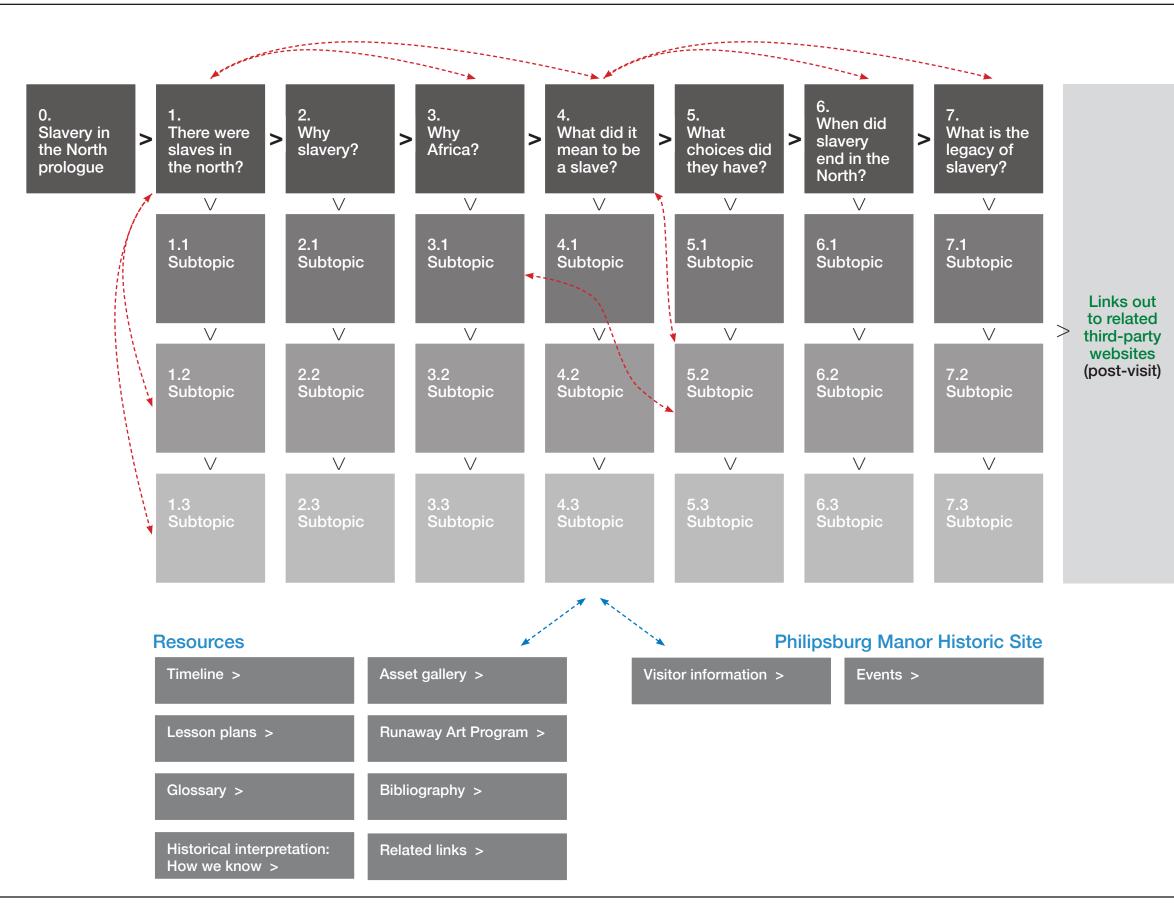
- Longer narratives
- Videos in chapters
- Interactive features
- Comparisons
- Visitor commenting
- Opinion pieces

Cross-navigation (no dead ends):

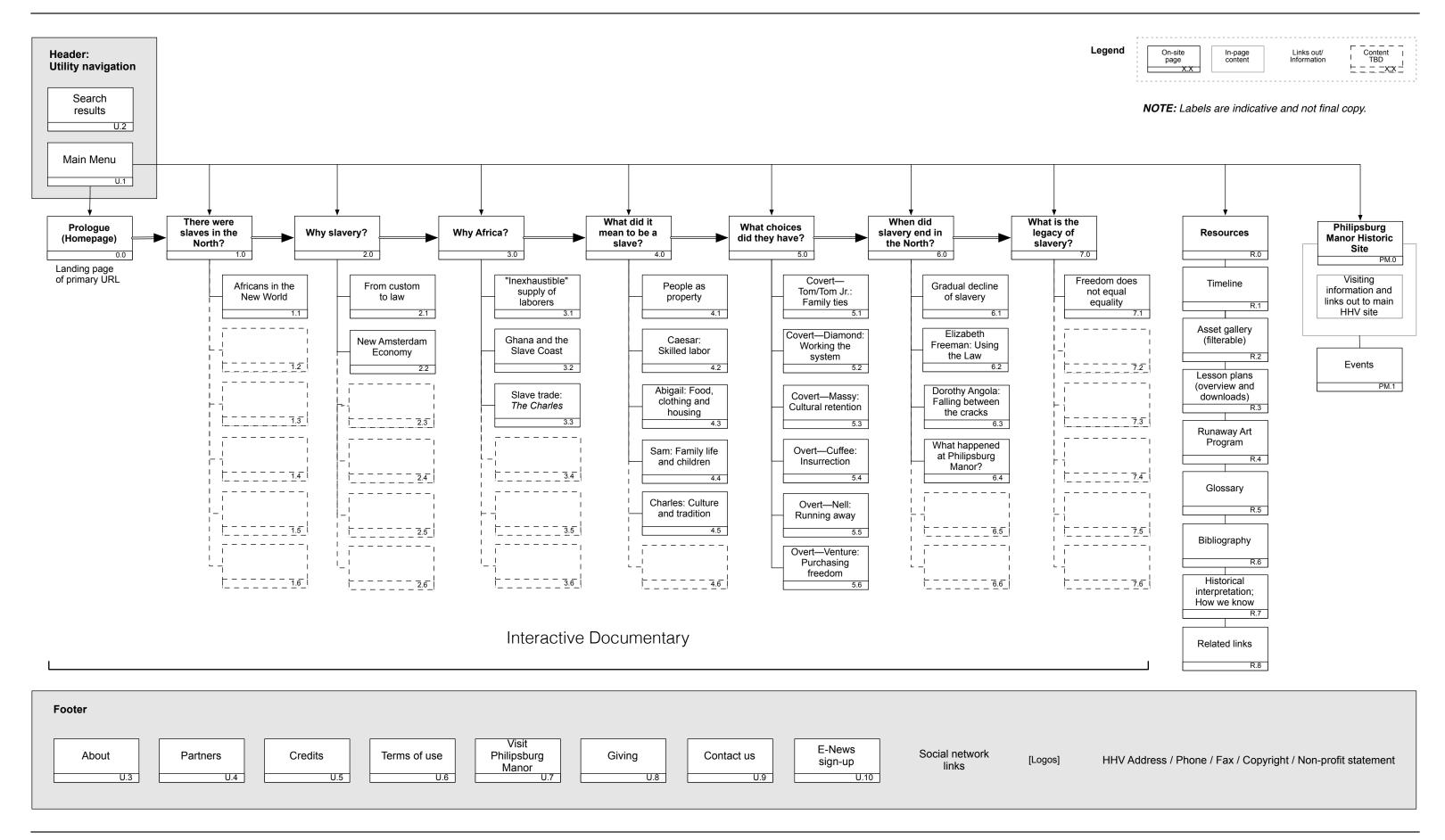
- Links between related, non-sequential topics and subtopics increases engagement time on the website.
- Links to related, internal resources promotes
 Philipsburg Manor historic site, programs, and
 events.

Post-visit:

Related, de-prioritized links may take the visitor out to third-party websites for broader/deeper historical content or out to relevant contemporary content to encourage further learning and conversation.



HIGH-LEVEL INFORMATION ARCHITECTURE with PARTIAL CONTENT MAPPING

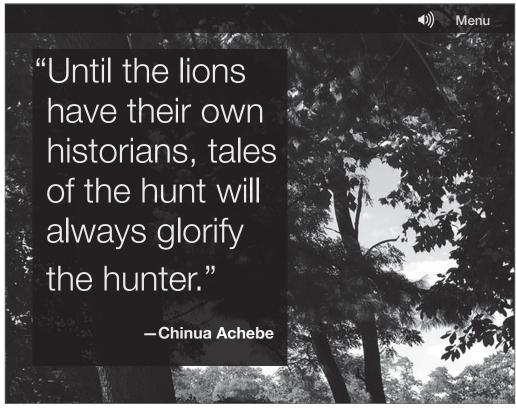




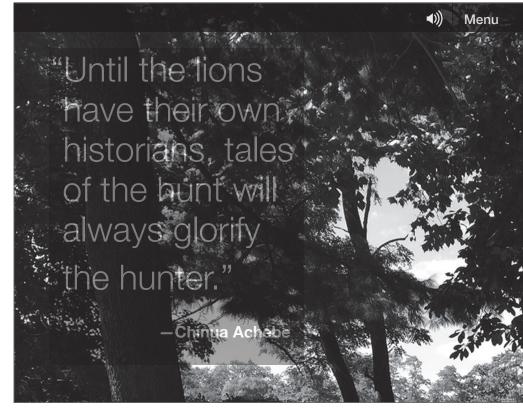
1. The website opens with a full-screen, evocative video of timeless, slow-moving tree branches and sounds of nature.

Global options (on all screens):

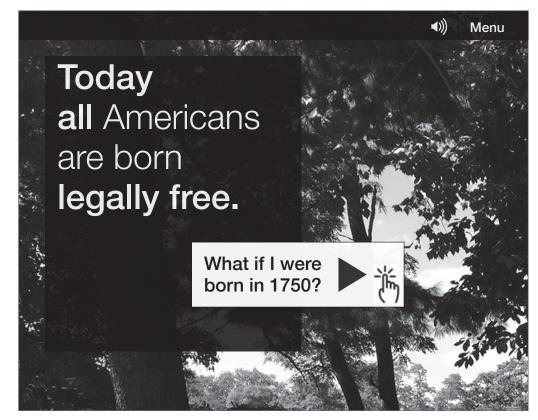
- Volume control
- Main menu to skip to a chapter or another section of the website
- Footer (not shown in these wireframes): See sitemap for links available in the footer.



2. Intriguing introductory quote appears and stays on-screen long enough to read.



3. Automatic transition.

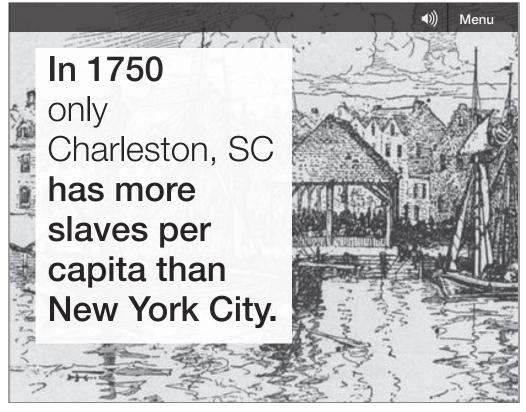


4. Over the timeless video of nature an obvious statistic about today appears. Nature sounds continue.

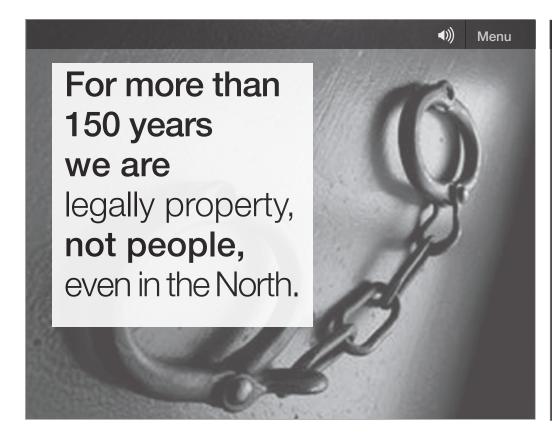
The visitor is invited to go back in history to compare...



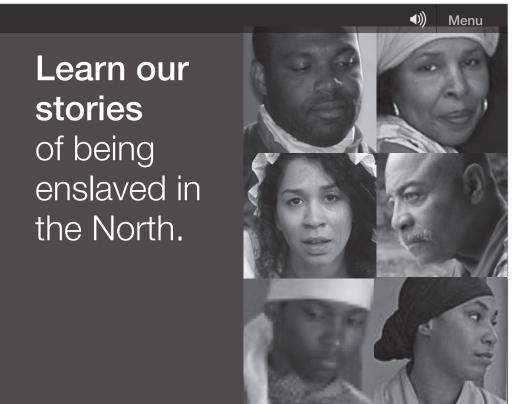
5. The scene zooms out to show Philipsburg Manor, an 18th-century manor house, with a dramatic, contrasting statistic from 1750. Some sounds of people working the fields or the mill start to layer on top of the nature sounds.



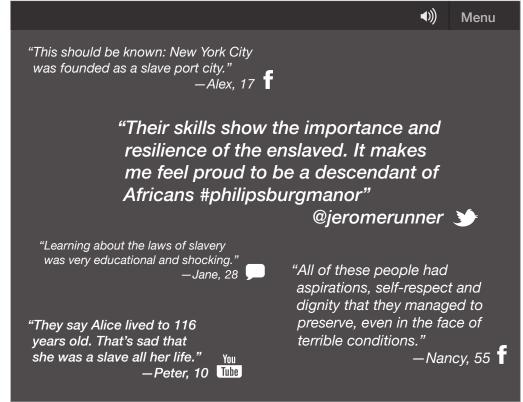
6. Transition to a related, little-known statistic about slavery in the colonial North, with corresponding urban background image and sounds, possibly of the NYC slave market.



7. Transition to a more shocking message and image, in silence, that provoke empathy.



8. Transition to hope by giving the visitor a mission to understand the perspective of the enslaved, learning the stories of individuals rather than the institution of slavery.



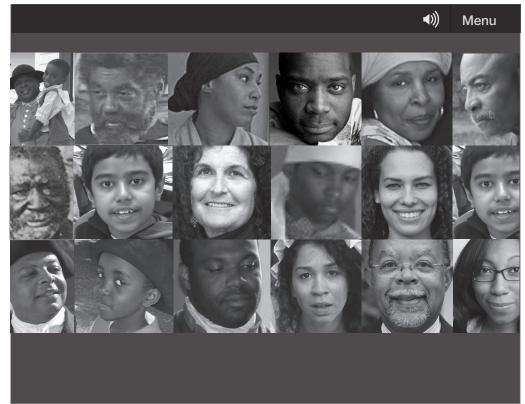
9. Transition to quotes from our contemporary peers about what most impressed them about the story of slavery in the North—"social proof" that people have been moved by this content.

These quotes would be curated and could be drawn from:

- Visitor comments on the website
- Social media posts
- Historic site visitor surveys
- Online survey question that launches when the user leaves, only appearing if the user spent a certain amount of time on the website.

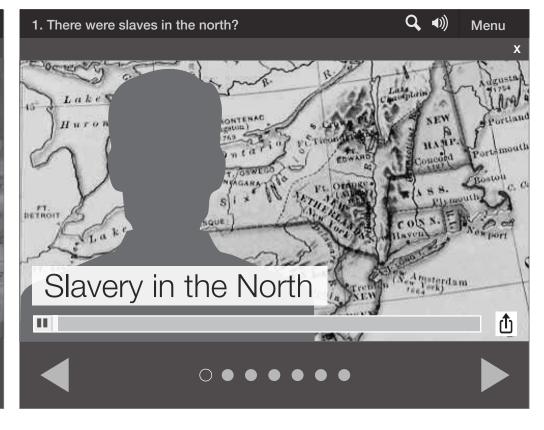
Q (1))

Menu



What do you mean there were slaves in the North?

Find out from those who know



10. Transition to an opening of an introductory video showing images representing enslaved people from the past mixed with "connectors"—people today, who our audiences can identify with, or maybe even know as celebrities in their field. Historic and contemporary people should be clearly differentiated.

11. The first chapter title appears in the header.

1. There were slaves in the north?

The website's homepage title screen appears with a play button to take the visitor into the interactive documentary, starting with an introductory video.

At this point, other navigation elements appear to allow the user to:

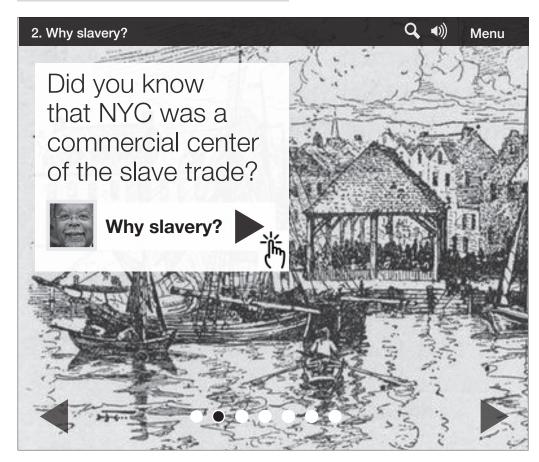
- Search the site
- Skip ahead and back through chapters

12. Introductory video begins to play.

The visitor can:

- Watch, control and share the video
- Close the video to continue
- Skip ahead with the chapter navigator
- Open the main menu
- Search the website

Humanities theme: Colonial economic development depended upon the enslaved



13. Chapter title and corresponding "did you know" text include the prompt to continue on a guided narration of this chapter by one of our "connectors."

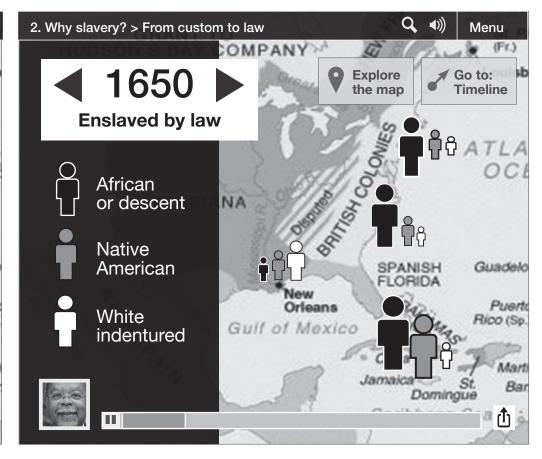
When the visitor taps the Play button, the background transitions to a map. Our "connector" narrator describes briefly some regions on the map of North and South America for context to introduce the subtopic of the background of slavery as custom vs. law, and the density of slavery over time in various regions.



14. After an intro is given by the "connector," he or she narrates the subtopic as datagraphics are populated on the regions of a map over time.

The visitor can see how much time is left and can pause the narration.

(Data displayed here is placeholder)

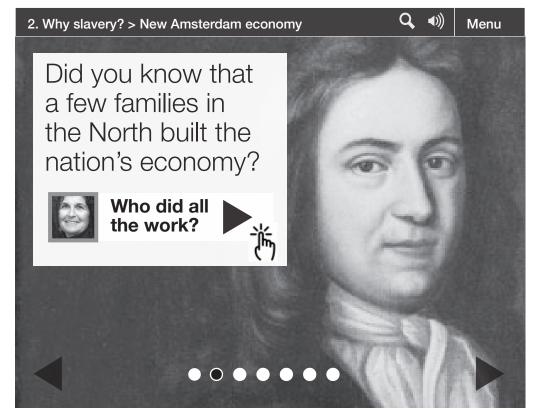


15. The visitor can also tap on the 'Explore the map' button to use the self-guided mode at any time.

The self-guided map could allow the visitor to zoom in and out to explore farther or closer regions of the Atlantic System.

As this content relies on a series of dates, a related link is also secondarily available, if the visitor would like to go to the Resources section to browse the full timeline.

(Data displayed here is placeholder)







16. Subchapter title and corresponding "did you know" text include the prompt to continue on a guided narration by one of our "connectors."

Slideshow starts with an overview about the economic importance of the Hudson Valley region and the Philipse family's role, which is known through rich historic documentation.

17. The slideshow introduces the people owned by the Philipse family from the perspective of how they were vital to the economy—but have virtually no recorded history nor credit.

Possibly a poignant, curated visitor comment could help introduce this concept during the slideshow.

18. Interactive slideshow of the statistics of provisions that fueled the colonial economy, powered by enslaved people.

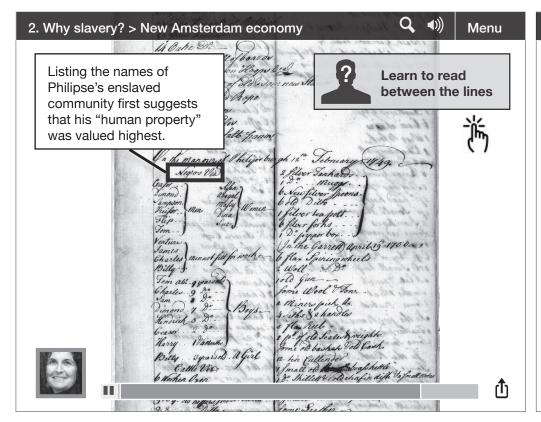
Comparisons in today's terms are used where possible.

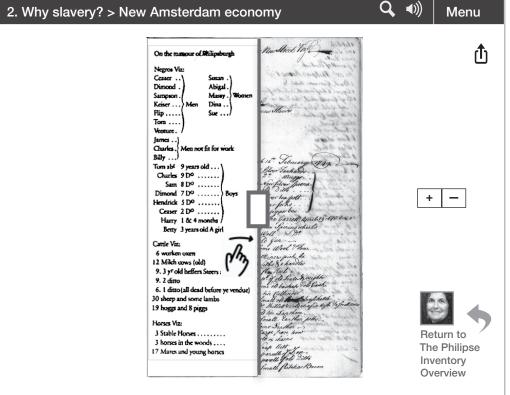
The visitor can interrupt the slideshow at any time by jumping to the next or previous provision displayed.

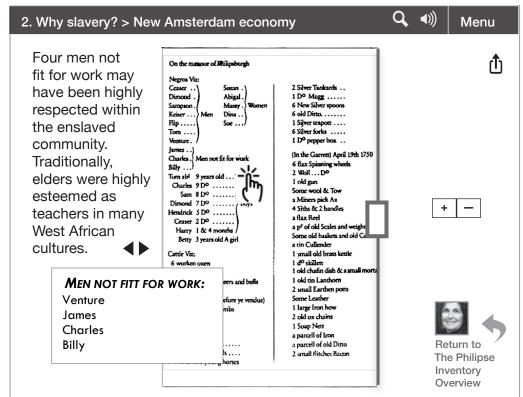
Certain provisions can cross-link to related personal stories in the 'What did it mean to be a slave?' chapter (e.g. Caesar the miller's story about skilled labor).

Humanities theme:

The inhumanity of enslavement stems not from the labor or the living conditions, but from from the classification of captive Africans as property rather than person







19. The slideshow continues with Adolph Philipse's 1750 inventory and a high-level read of what it meant, highlighting pertinent parts.

Slideshow ends with an invitation to continue, to meet the enslaved individuals living on the Philipse family's northern plantation.

The visitor can select a secondary prompt to learn how to read between the lines for more information.

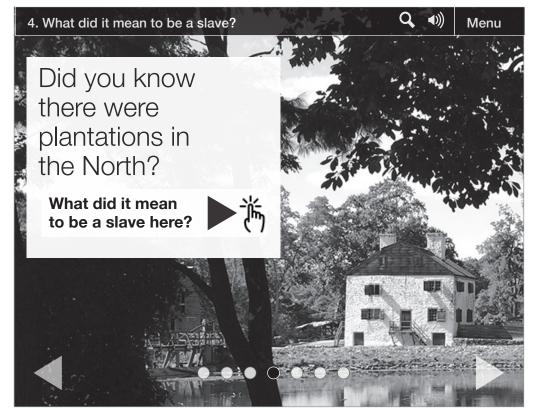
20. After tapping to learn to read between the lines, the screen "flips over" to reveal an interactive feature that allows the visitor to explore this document indepth.

The visitor can swipe on a layer of clear transcription to read the document with ease.

Zoom-in functionality allows the visitor to enlarge to read better or view the calligraphic details of the original historical document.

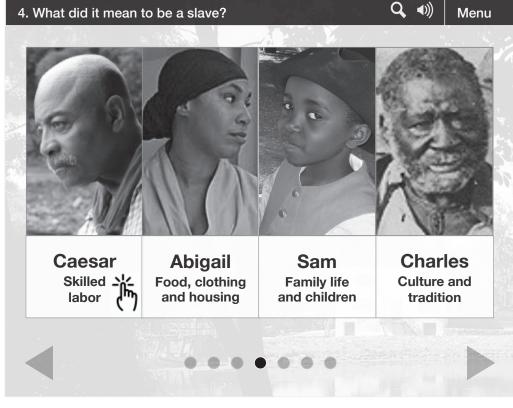
21. Interactive hotspots on the document reveal pop-ups with details related to the enslaved as human beings with aspirations and talents, while also pointing out other information regarding the inhumanity of slavery, represented here by reducing people to a list of property.

24. Example of a personal story, with highlighted parts indicating where the visitor can go deeper to understand concepts or engage in an interactive feature.



22. Chapter title and corresponding "did you know" text include the prompt to motivate the visitor to go deeper and discover what life was like on the plantation.

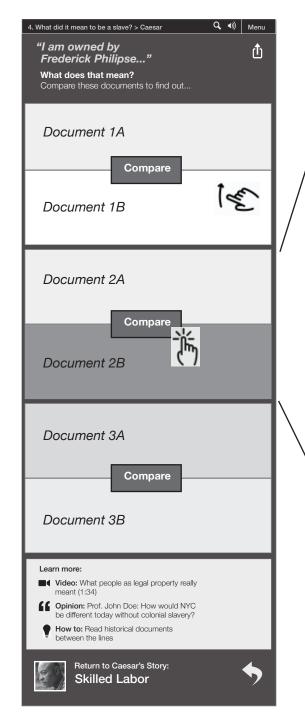
A brief video introduction ends in a submenu of subtopics...



23. Submenu of subtopics about life for the enslaved on a northern plantation—each represented by a singular person's story. Through the content, the visitor will understand that the names of the people are real, but the lives they represent are historical interpretation.

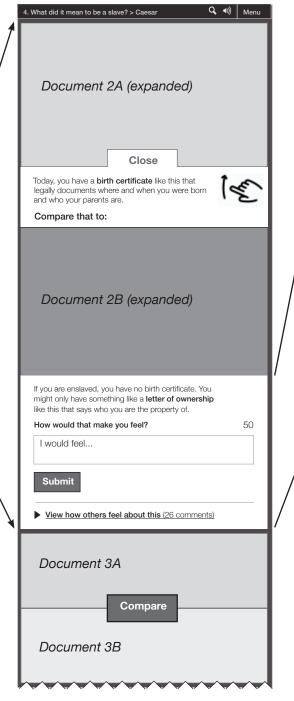


25. The screen "flips over" to reveal an interactive feature that allows the visitor to compare contemporary personal documents to historic versions, exploring the theme of people as property.



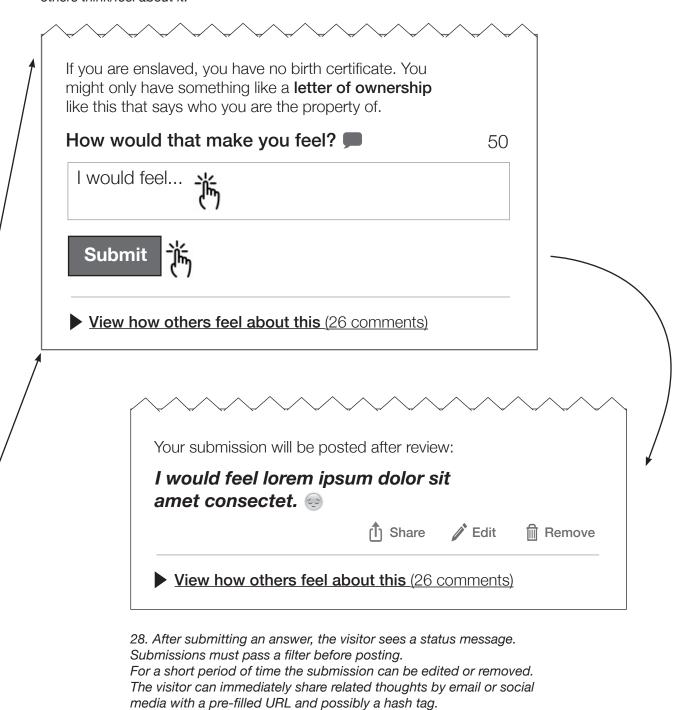
See 25a. Example sets of comparative documents.

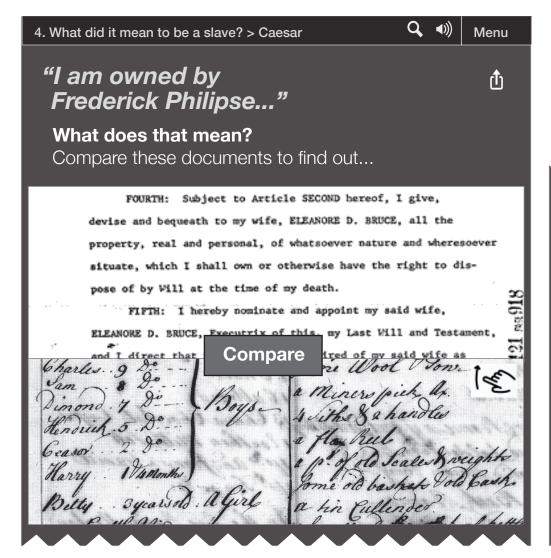
26. The visitor can scroll through curated pairs of documents and select a set to explore. It then opens to reveal the full documents with captions, to compare each one...



See 26a. Example of expanded open set of full documents to compare.

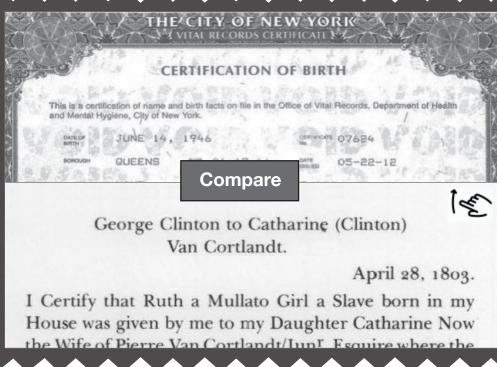
27. ...and asking a question the visitor can reflect upon and answer—or view what others think/feel about it.





25a. Scrolling down the screen, the visitor can select a pair of documents to compare. Examples:

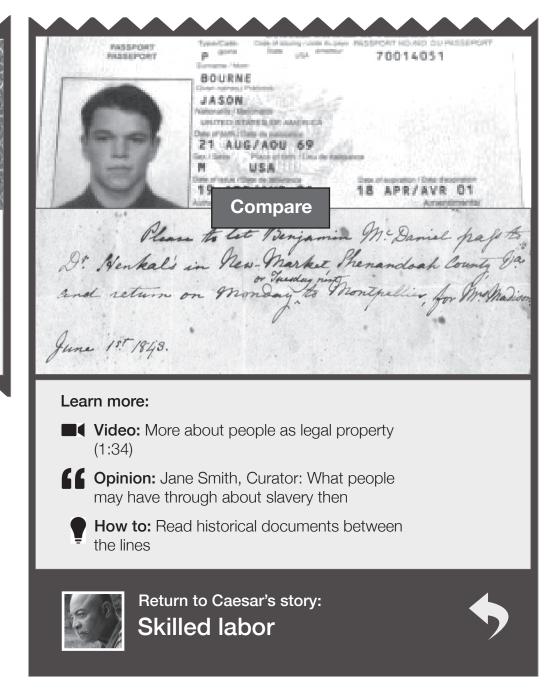
- Last will and testament vs. probate inventory
- Birth certificate vs. letter of ownership
- Passport vs. slave pass

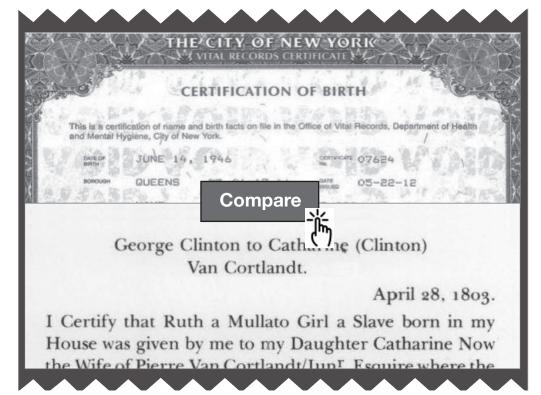


Note: This letter will actually display as the manuscript from the New York Public Library collection.

See 26a. Example of expanded open set of full documents to compare.

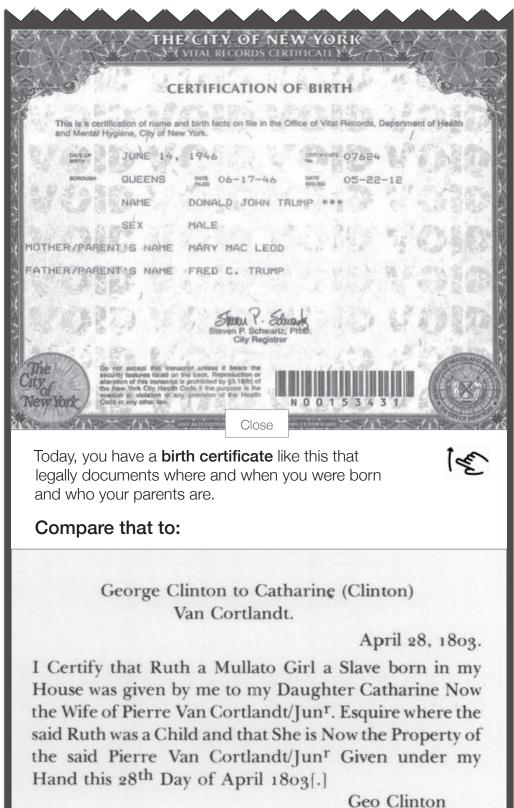
25b. At the bottom of the scrolling screen the visitor has the option to delve deeper into the people as property theme; to cross-link to related content; or to return to Caesar's story.





26a. When the visitor selects a set of documents, they expand open and reveal brief informational texts comparing each one, starting with the more familiar, contemporary one.

A prompt to reflect on the comparison - or view what others think/feel about it - appears after the captions.



George Clinton to Catharine (Clinton) Van Cortlandt.

April 28, 1803.

I Certify that Ruth a Mullato Girl a Slave born in my House was given by me to my Daughter Catharine Now the Wife of Pierre Van Cortlandt/Jun^r. Esquire where the said Ruth was a Child and that She is Now the Property of the said Pierre Van Cortlandt/Jun^r Given under my Hand this 28th Day of April 1803[.]

Geo Clinton

If you are enslaved, you have no birth certificate. You might only have a **letter of ownership** like this that says who owns you.

How would that make you feel?

50

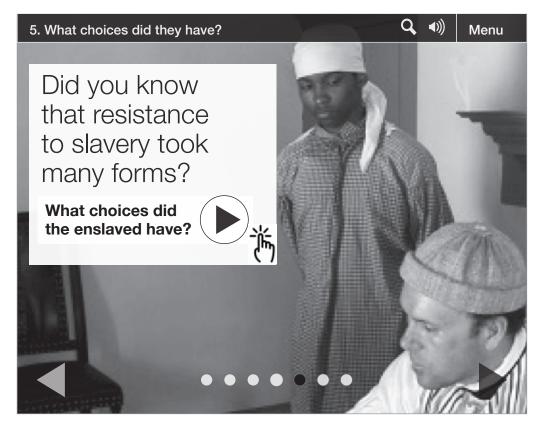
I would feel...

Submit

View how others feel about this (26 comments)

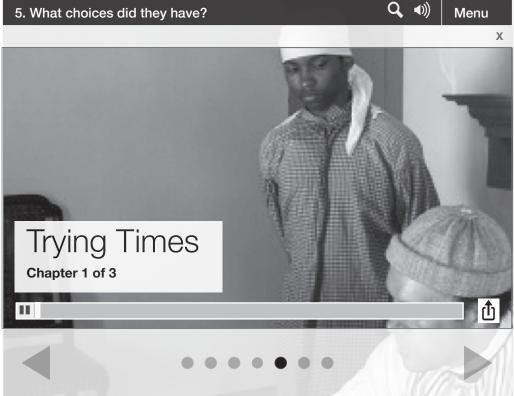
Humanities theme:

Resistance in its many forms by slaves was a means of asserting personal volition



29. Chapter title and corresponding "did you know" text include the prompt to motivate the visitor to play the first chapter of a video vignette about the topic of covert and overt resistance.

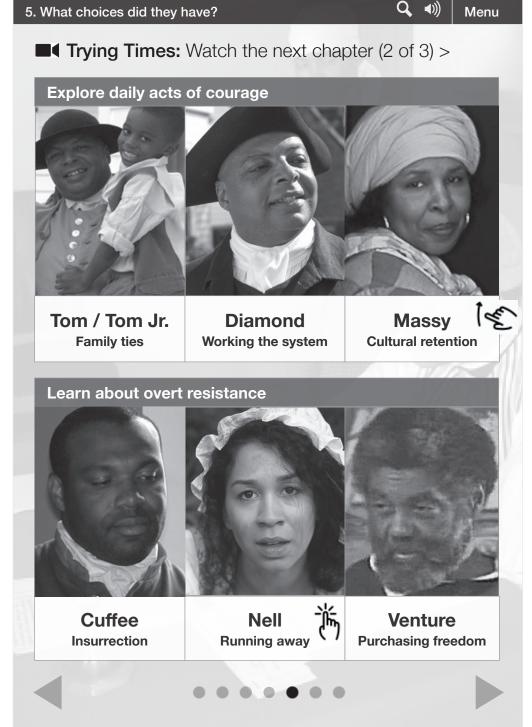
The first chapter of the video vignette plays.



30. After the first chapter of the video vignette ends, the visitor can either watch another chapter or dive deeper into a submenu, offering personal stories.

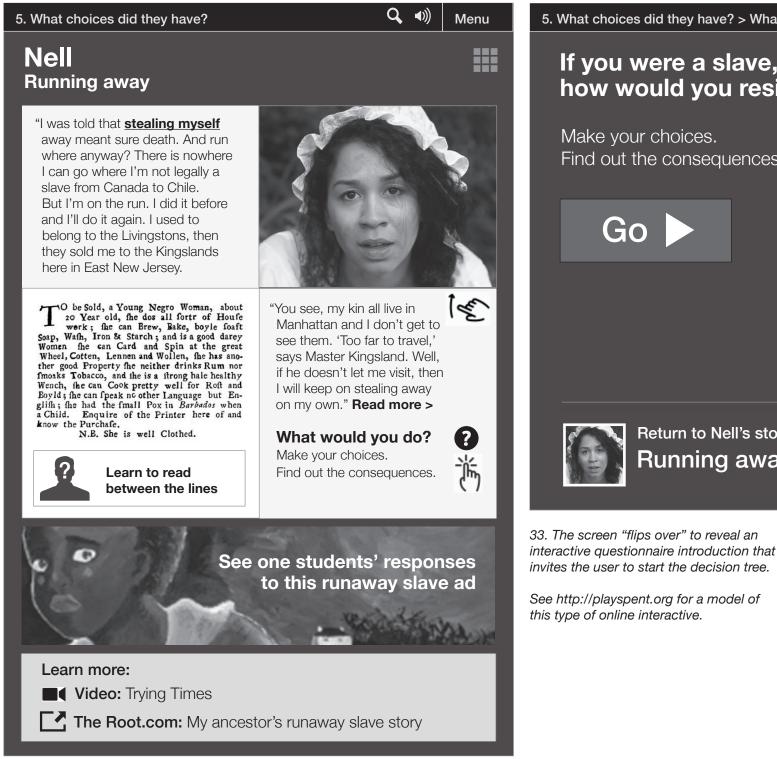
The visitor has the option at any time to close the video, while it plays, upon which this same submenu appears.

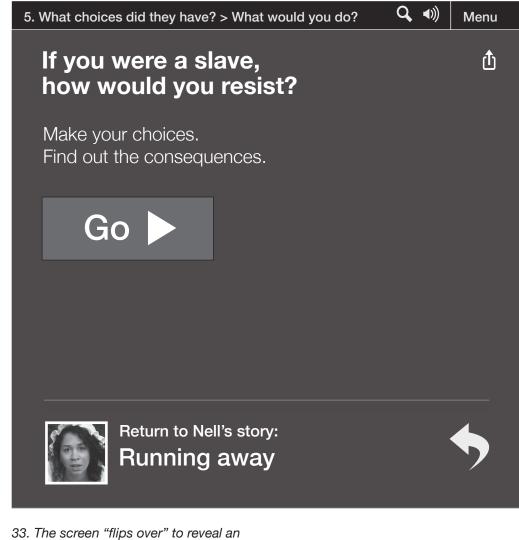
31. The personal stories submenu offers information about the different forms of resistance (overt and covert) practiced by the enslaved. Through the content, the visitor will understand that the names of the people are real, but the lives they represent are historical interpretation.

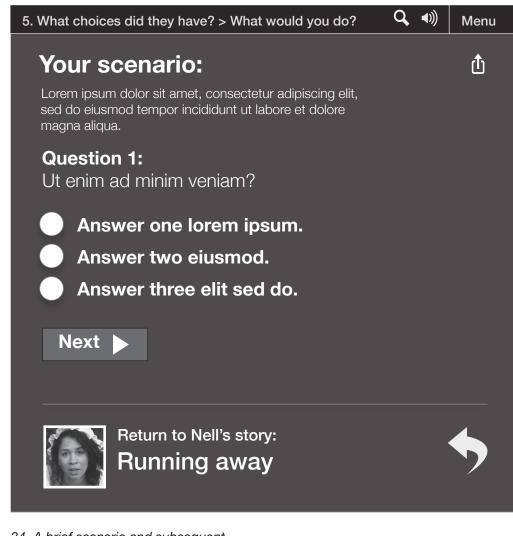


32. Nell's personal narrative about running away includes various types of content related to the topic.

A main prompt asks the visitor to engage in an interactive questionnaire.







34. A brief scenario and subsequent series of questions and answers take the visitor down a path, ending in certain consequences.

The visitor then has the option to share their results (what would they do) on the website and/or on social media.

There will be various scenarios to choose from.

TECHNICAL SPECIFICATIONS

Delivery of the second phase (or "prototype") should include technical recommendations and scope for NEH approval of the third phase of work. As the user interface and the functionality of the prototype is agreed upon, C&G Partners (CGP) will review the features and requirements included in the second phase, and work with the Historic Hudson Valley (HHV) site administrators to make a recommendation as to the best development platform for the website at that time.

As a baseline, CGP generally recommends an open-source solution to provide the most sustainable option, as opposed to a proprietary, closed-source solution. CGP has in-depth experience with a number of popular website development frameworks and content management systems, including Django (Python), Drupal (PHP), Wordpress (PHP), ExpressionEngine (PHP) and many micro-development frameworks. All content management systems CGP works with and recommend contain a suite of tools designed to easily allow content administrators to edit and publish both textual and media content.

CGP evaluates how their clients' needs align with the features of a content management platform, long-term maintenance needs, and the internal resources for both managing and continuing development on the website after final delivery. Their tool kit spans the gamut of possibilities, allowing their clients to control and manage the content on their website.

Content Types and Presentation

C&G Partners starts every web project from a foundation of modern, standards-based, semantic HTML5, helping search engines better understand the content on the website. Presentation is driven by CSS3 utilizing SASS–a CSS framework helping to ensure design consistency and optimized files for more efficient downloading. We strive to separate content from presentation, building forward-compatible, responsive templates that can be readily integrated into any content management system, and are easily understood by any future developers that might need to update them.

Interactive Development

As website designs incorporate greater amounts of interactivity, JavaScript plays a greater role in the development of your website. We craft everything from simple jQuery plug-ins to complex data-driven applications to support our clients' needs based on the latest design and deployment methodologies including backbone.js, require.js, spine.js and Coffeescript where applicable. The use of JavaScript can at times be discretionary and we ensure that information can still be accessed on critical pages, modules, and features where JavaScript should not be a requirement.

Responsive Mobile Layouts

Our sites are designed to be responsive. Layouts will utilize media queries to resize grid-based designs at defined breakpoints such for mobile, tablet, and desktop, dynamically scaling and fitting various screen resolutions. This approach will serve iOS as well as Android mobile users. The need to optimize for particular operating systems and devices (mobile/tablet) will be determined at the time of the build phase being approved.

SEO

Our SEO-related tasks can help the content hosted on the website become more relevant to search engines, in organic search results, and social media networking. These configurations relate to optimizing site speed performance, social media network tagging and how search engines may find, index and rank the content for relevancy of important keywords.

Accessibility

We make our templates as accessible as possible, ensuring that content can be consumed by the widest possible audience (including blind or visually-impaired visitors). We design and build our templates keeping in mind the guidelines set forth by Section 508 of the Federal Rehabilitation Act, as well as the recommendations of WAI-ARIA, the W3C's draft recommendations for making modern websites accessible.

Video Content

For video content, the use of third-party hosting platforms such as YouTube and Vimeo are recommended to ensure the best performance and compatibility for as many visitors as possible. And depending on the context, functionality, and social media requirements of the various videos, both YouTube (widest audience) and Vimeo (most customizable) may be used.

User Generated Content

Any content contributed by site users will be moderated prior to being published to the public. Automated filters can be set up on the site to catch known obscenities prior to the user generated content being submitted for review, requesting the user to remove the offensive word and resubmit. Upon submittal, the content would be queued within the CMS awaiting admin approval for publication. An automated notification could go out to the admin via email if desired that user content is waiting to be reviewed. This level of manual moderation would catch any contextual language that could be considered hate speech, personal attacks, or any material constituting harassment. Once the content passes moderation and is published, the user could receive an email notification, if the content itself relates to a user's email address; this would be determined at the inception of the build phase if it's an appropriate/desirable feature.

Analytics

We recommend the use of Google Analytics (http://google.com/analytics)—a free, industry-standard service for monitoring and analyzing visitor traffic.

Browser Support

We typically support the three most recent versions of the most popular web browsers at the time of the start of project development, which comprises Chrome, Safari, Firefox and Internet Explorer. For any progressive features conceived at that point, and depending on the features, support for Internet Explorer may require version 10 and above due to its late adoption of certain web standards. Progressive enhancement and graceful degradation strategies for older versions can be determined on a case-by-case basis. As a result of the pace of mobile hardware development, OS testing availability, and severe market fragmentation, mobile support will be optimized for the two most recent or popular versions of iOS and Android, but the site will generally still be accessible on older versions.

DevOps & Web Hosting

DevOps covers all aspects of hosting and deployment of the website. Our recommended technology stack for most websites is either LAMP or a variation thereof. LAMP stands for Linux, Apache, MySQL, and PHP. For Django applications, MySQL and PHP would be replaced by Python and PostgreSQL. These stacks power the majority of the websites on the internet and have proven time and again to be affordable and reliable platforms. Our team has considerable experience designing and deploying highly scalable web applications within the cloud—specifically via Amazon Web Services and the Rackspace Cloud. We utilize the cloud for projects with a heavy reliance on image and video content, high-traffic, or unique technical needs. Cloud-based services provide dedicated virtual servers for your website and applications with extremely affordable pay-per-use pricing. Cloud hosting also allows your hosting to grow with you by providing resources on-demand, making it nearly impossible to outgrow. In the build phase, we will work with HHV's IT team to identify available hardware resources, scalability and distribution requirements, and application hosting requirements for the selected platform, and work together to develop a deployment strategy.

SUSTAINABILITY PLAN

As noted in the Technical Specifications, an open-source CMS platform provides the safest, most sustainable solution, with a community of active developers constantly providing updates to maintain stability and security. The website information architecture and structural design will allow for flexible growth of content and changes over time. CGP will construct site elements as modularly as possible, to accommodate the addition of new modules, templates, and functions, and any possible need to amend the core set. Layouts and views will be abstracted as templates and the CSS and JavaScript frameworks will employ encapsulation and loose-coupling, organized in such a way that modules and classes will allow discrete modifications and additions in the future. This limits as much as possible any adverse effects on other modules and functionalities.

The combination of these approaches will streamline maintenance and avoid costly re-engineering each time new content or features are added or modified. Typical upkeep of a site can incur anywhere from \$2,000-15,000/year based on specific site features and customization that will be determined during the build phase. Core maintenance tasks typically include front- and back-end upgrades and security patches for self-hosted third-party software libraries, and compatibility updates for web browsers and any external third-party APIs (social media, SaaS services, etc.). Over the course of several years through to 2017 and beyond, it is anticipated that much of the software and services that will be used will likely evolve due to the ever-changing nature of web technology. The design of the application will try as much as possible to

streamline the replacement and modification of the modules, libraries, and services, to minimize costs. CGP will be available on an hourly or otherwise contracted basis to cover upkeep, including responses to any unforeseen changes in web technology and web standards in general.

Systematic evaluation will also contribute to the sustainability of the website. HHV will leverage the insights and understanding gleaned during the Discovery stage by reengaging independent evaluator Kate Tinworth (Founder and Principal, ExposeYourMuseum LLC) in the Prototyping phase. Ms. Tinworth will work closely with HHV and C&G Partners to lead usability testing of an early rendition of the prototype focusing on two of the four personas: Culture Seeker and Popular Culture Visitor. Focusing on these two personas represents opposite ends of the engagement spectrum, and will provide a nuanced understanding of use. Students and teachers—both distinct and complex user groups—will be the focus of later phases of the project.

Usability testing will accomplish multiple project goals: 1) to assess whether learning, engagement, and empathy are present for participants; 2) to evaluate the four humanities themes for the website; and 3) to determine if and how the site structure is intuitive and clear for primary users. This combines traditional usability testing with content evaluation, providing both HHV and C&G Partners key information to inform decision-making and next steps. The prototype will be tested in four distinct communities to assess for regional differences in response: Hudson Valley, NY; New York City,

NY; New Haven and/or Hartford, CT; and Durham and/or Chapel Hill, NC. This is particularly important due to the site's intended wide geographic reach. Following usability testing, ExposeYourMuseum will analyze and summarize results; a list of actionable recommendations will inform the final prototype.

Over the long term, HHV will use a combination of website analytics, visitor surveys and/or usability tests, and assessments of emerging national current events to make ongoing improvements to the website. To facilitate long-term maintenance of the website, HHV will allocate a portion of its operating budget and institutionalize fundraising efforts for this purpose.

As HHV digitizes assets and continues to conduct historical research over time, this website will be a repository to make this content available to the general public in our online asset gallery, bibliography, timeline and related links.

Further afield, our website content strategy includes partnering with other cultural institutions and media sources to offer related content to our visitors for extended learning about our themes and continued conversations about our topics that are relevant today and in the future.