

Arlington Historical Society Strategic Plan

The Arlington Historical Society is a 501c3 non-profit that was founded in 1897 for “the gathering and recording of knowledge of the history of Arlington and of individuals and families connected with the town, and the collection and preservation of printed and manuscript matter and other articles of historical and antiquarian interest.” The Society continues to promote a better understanding of the town’s history to show how the town came to its present state and for the edification of all of Arlington’s inhabitants now and in the future.

The historic Jason Russell House (JRH), located at 7 Jason Street, is owned and managed by the Society and is the Society’s greatest asset. The house itself is discussed in detail below. The Smith Museum located at 7R Jason St. was constructed in 1981, and houses both research and museum collections as well as exhibits. The Society is also responsible for the preservation and restoration of the JRH as well as our vast collection of documents, textiles, photographs and other objects.

Our educational goals are carried out by conducting tours of the Jason Russell House and Smith Museum as well as an innovative lecture series that is open to the public. We also carry out a program for area 3rd grade students where they tour the home and learn more about “Colonial Farm Life” through a series of activities.

A volunteer-driven organization, the Society is governed by an 11 member board of directors, elected by the membership, which currently numbers approximately 250. The office is staffed by a part-time Museum Administrator and other tasks are performed by a live-in caretaker. The Society draws on numerous active volunteers, who perform such critical work as: giving lectures to the public; serving as tour guides for the JRH; working with collections; and other aspects of general operation.

The board embarked on a strategic planning process in the summer of 2014, and created an ad hoc committee to develop a plan for board and, ultimately membership approval. The committee met regularly and sought out advice as needed. This report came out of that effort.



1 Panoramic photograph of Arlington -- AHS collections

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I. BUILDINGS AND GROUNDS



The Society has two buildings linked together. The Smith Museum and the Jason Russell House.

a. The Jason Russell House

The Jason Russell House is an 18th century house that was the site of a fatal skirmish between retreating British soldiers and local civilians on April 19th, 1775. The fatalities included Jason Russell, the owner and builder of the house.

While the house has been moved several times and undergone restoration soon after it came in the hands of the Society, its 18th century core, built by Jason Russell, remains intact. Russell heirs made later additions that did not compromise the architectural integrity of the house: in the Federal period, the projecting front entryway, and in the mid-19th Century, the current lean-to and the ell, which now serves as the caretaker's quarters. Several outbuildings were attached or removed over the years. In 1923, the Society purchased the house and restored it using lumber from two contemporary houses that were being demolished by the town.

2 Early 20th Century photograph of the JRH

Recent work on the Jason Russell House includes:

- 1) Roofing replacement, including the replacement of much of the wood sheathing
- 2) Heating system replacement for the caretaker's quarters
- 3) Ceiling insulation for the caretaker's quarters
- 4) Painting touchup
- 5) Dendrochronological (tree ring) dating that shows the house was built in 1745 as oral tradition states, but also shows that some timbers dating to 1676 were also used. The earlier date is about the



3 Core samples extracted for dendrochronology research

time that Jason Russell's grandfather (also named) Jason built a house.

The Jason Russell House is in need of some extensive maintenance work related to the age of the structure. These include:

- 1) Repair of the sill on the north side of the house
- 2) Repointing of the mortar in the chimney
- 3) Repair of the eaves
- 4) Repair of the foundation
- 5) Gutter replacement
- 6) Repair of the rain water drainage system

In the final move of the Jason Russell House, the structure was placed over a very shallow basement due to a large ledge. The foundation provided was not of a high quality. This has caused deterioration of some of the main timbers below the first floor. The foundation walls are crumbling. It will be necessary to replace many of these timbers and the foundation itself. This has been estimated to cost between \$600K and \$1.2M.



4 Visitors in the JRH kitchen

GOALS:

- CAP Assessment: Complete Conservation Assessment Program for Jason Russell House to identify the appropriate way to rectify issues of maintenance in a historically accurate manner.
- Consultation with experts in Historic Preservation: Consult with local State Historic Preservation office to find out what resources are available and develop a list of knowledgeable individuals who can consult on any further restoration projects and ensure historical accuracy and integrity.
- Repairs to Jason Russell House: Consult with construction companies with historic structure experience and gather estimates for all repairs outlined above (sills, eaves, foundation, etc.). Carry out fundraising efforts for specific repairs and complete.



b. The Smith Museum

Through generous donations from the Smith family, four late 19th century houses surrounding the Jason Russell House were purchased and demolished to build the Smith Museum. The museum fulfilled a much-needed secure, fireproof, and climate-controlled collections storage area as well as a display gallery and office space. The museum is connected to the JRH through 18th century outbuildings that have been attached to the JRH.

The Smith Museum provides a 1,100 sq ft exhibit space, a 970 sq ft archival work and storage space, restrooms, a small kitchen, and a 250 sq ft office space for staff and volunteers. The Smith Museum was completed in 1981 and is constructed of concrete blocks on a poured concrete foundation.

5 Smith Museum visitors

Recent work done on the Smith Museum includes:

1. Painting touchup
2. Repair to west side sill
3. Roofing replacement including much of the wood sheathing
4. Air conditioner compressor replacement
5. Hot water heater replacement

The Smith Museum is in need of moderate maintenance work. Including:

1. Repair of the eaves
2. Repair of the rain water drainage system
3. Replacement of exhibit and archive lighting and switches
4. Replacement of exterior lighting
5. Replacement of gutters
6. Replacement of bathroom fixtures
7. Replacement of exhibit room carpeting
8. Repair on west side wall

GOALS:

- Visitor enhancements to the Smith Museum: Improve entrance area connecting Smith Museum and Jason Russell House for better way-finding of visitors, a more inviting entry area, and improved security. The Smith Museum was built to conform to the historic feel of

the Jason Russell House. It was intended to look somewhat like a barn, as it was in the space that the barn would have been. Visitors, however, do not see this concept and are often confused about the location of the entrance. This space could be reworked with some new components to help make the entrance more inviting and to help visitors find us. A new door, signage, and other entry-focused changes will help in this regard. Better outside lighting is also needed.

- Repairs to Smith Museum: Exterior repairs to Smith Museum including painting, lighting, gutters, and wall repair. Paint and design work should follow the original design strategy of the building to resemble the JRH barn and yard.
- Interior improvement and repairs: Improve interior spaces by replacing or repairing carpeting, bathrooms, and lighting.



c. The Grounds

The Jason Russell House and Smith Museum sit on a combined 26,330 square foot (0.6 ac) lot. This is actually 5 house lots reassembled into one lot. The grounds are relatively level with some large trees in the yard and simple plantings along the east and south sides of the foundations.

There is a small parking lot on the south side of the Smith Museum and a single car spot for the caretaker on the east side

of the lot.

Recent work done on the grounds includes:

6 Jason Russell House and grounds, 2014

the Jason Russell House from Massachusetts Avenue

The grounds need some work and this includes:

1. Repaving of the parking spots
2. Filling in of some depressions left by removed trees
3. Some tree work including the removal of a failing sugar maple
4. Resetting of the flagstone path that has sunken over the decades
5. Addition of more picnic tables
6. Improved lighting

GOALS:

1. Removal of pine tree limbs to expose

- Improve usability of grounds as community space: Multiple picnic tables have been introduced and these are regularly used. The parking, tree locations, and signage need to all be reexamined for 21st century usage.
- Garden outdoor exhibition: Develop historically accurate gardens with interpretive signage on the grounds. Work with the local garden club to research what kinds of vegetables, herbs, and flowers would be grown in the average Colonial farmer's lot. Use this research to carry out the planting and maintenance of the garden and communicate this information to visitors.
- Heritage apple orchard: Replace failing trees with heritage variety apple trees (4-6). Project can be grant funded and coordinated with garden club.
- Parking improvements: Repave parking and fire lane, improve signage for visitor parking areas.



7 A reenactor interacts with the public at an outdoor event on the JRH grounds

II. COLLECTIONS



8 Tagged objects in storage area

The Society began developing its collections in 1897. In 1907, the Society began to formally accession all collections with individual accession and object ID numbers, giving current year (year of recording) to all previous donations. This period represented a surge in donating: some of the best collections of museum objects were donated from the founding until about the 1940s.

The Society houses an extensive collection of Arlington (and non-Arlington) objects. What the

establishing Bylaws refer to as “Archives” include 4 collections of objects: archives, photographs, objects, and the library. Each of these sets of objects has differing requirements for care and conservation or preservation. The majority of all of collections are stored in storage areas below the Museum, which are mostly climate and humidity controlled. A small quantity of less fragile objects are stored in additional storage space adjacent to the Jason Russell House. The Society also keeps some objects in a safe deposit box.

- *Archives include:* Archives of the Society, manuscripts, diaries, correspondence, deeds and other primary source records of town history and residents, maps, architectural plans, ephemera, audio and visual recordings. There are 3,153 items in the archives.
- *Photographic collections include:* Various types of historic photographic prints, negatives, and a large collection of lantern slides. There are 3,723 items in this collection.
- *The Library includes:* A collection of antique or rare books; it is housed along with our Archival collections. The Library also includes common published texts relevant to Arlington History. There are 1,233 books in this collection.
- *Object Collection includes:* Material culture collections from 18th century to present including a large proportion of textiles, furnishings and household implements, militaria and collections related to the Revolutionary War. The Jason Russell House itself is often considered a crucial part of the Society’s collection. There are 4,331 objects.



Collections are under the control of the Museum Administrator, working with the Collections Committee. The Committee meets and deliberates on new acquisitions and deaccessions makes policy recommendations to the board. There is a dedicated *Collections Acquisition & Restoration Fund* that exists to increase the Arlington-relevant items in the collection and underwrite the restoration of collection items. This fund is managed by the Collections Committee and is not an element of the operating budget. There is a separate line item, supplies needed for collections care activities, as part of the annual operating budget.

The Society has primarily relied on passive collecting strategies, which has led to significant gaps in the

9 8 x 10" tintype photograph of Fred Chase in front of the "Old" Town Hall c. 1856

collection. Much has been deaccessioned since the 1980s, but a thorough deaccession review is needed. From time to time a committee member has identified objects for sale in the open market and acquired them with approval from the committee. A concentrated effort to seek out specific objects for purchase to fulfill specific concerns, however, has not been undertaken.



10 Needlework by Susanna Adams
Winn

Challenges

Although collections have been digitized to some extent, there is a continued need to better inventory, catalog and digitize Society holdings. The last time there was a complete inventory was 1987. In 2013 and 2014 nearly all paper accession records have been recorded into a collections management system, but this is a piecemeal effort. Most of the information that was recorded came from the 1987 inventory records and was added as a placeholder for when further work could be done. A complete inventory and digitization would require that objects are identified, photographed, and better described, with location information included in each record.

The collection is currently underutilized as a resource to scholars. In the past, the Society has been able to assist when serious scholars propose specific projects. The availability of online collections can go a long way in fulfilling our mission to the public, and providing access to scholars of all levels and abilities. Digitization efforts should include some aspect of online access, which can be easily integrated with the collections management system. It will lead to wider interest and support among the public.

GOALS:

- **Complete inventory and provide online access:** Identify objects that have complete records in the collections management system and put them online in some form. One option is Omeka, a free software system that works well with PastPerfect (our CMS). Other options can be exported excel tables or pdfs. This large-scale project can be carried out in either smaller identified projects, or in one large grant-funded project for the entire collection.
- **Improve Preservation:** Make some changes to storage materials and facility to better care for collections and to improve sustainability, so that ongoing costs of climate control are stabilized.

- IRH display object care: Improve environmental care for objects on display and stored in the Jason Russell House. Objects must be protected against light, fluctuation temperature, and humidity.

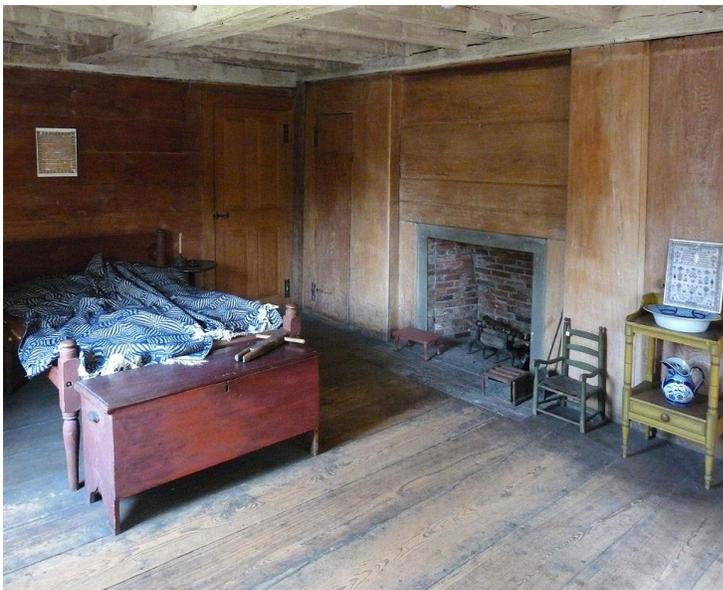


11 One of over 100 Daguerreotypes in the collection depicts Maria Farmer Robbins

- Improve Collections: Complete a full deaccession review and develop a plan for active collection strategies to fill gaps in the collection. Carry out plan to build and improve the collection in key areas. Reach out to descendants of local figures.
- Emergency Planning: Complete Emergency Planning process and put plan into place.

III. EXHIBITS AND PROGRAMS

a. The Jason Russell House Interior



12 One of the upper bedrooms in the JRH

The Jason Russell House has landmark status as the site of the bloodiest battle on the first day of the Revolutionary War. It is also a rarely found example of an *ordinary* Colonial farmer's home remodeled to the period. Many house museums tend to be the prominent homes of only the wealthiest citizens. Similarly, the story of Menotomy's (Arlington today) role in the Revolution is lost amongst the well-promoted sites in Lexington and Concord. This makes interpretation of the home an important lesson in Colonial farm life as well as an interesting account of a lesser known story of April 19, 1775.

GOALS:

- Exhibition in “Assembly Room”: Complete an introductory exhibition in the lean-to back entrance area where congregating visitors can learn about aspects of Colonial farm life and receive an interpretive introduction to the events of April 19, 1775.
- Jason Russell House interpretative plan and furnishing plan: Complete a Collections and Interpretive Plan for the Jason Russell House interior and seek funds to implement the plan. Although the house has been restored to fit into the Colonial and Federal periods, the furnishings do not all reflect this period. What is on display is often what could be found in the collection, whether the period was accurate or not. Although it is mainly interpreted as a Revolutionary War site, the house is outfitted with an array of objects spanning 3 centuries – the result of a lack of necessary objects in the display.



13 A guide leads a group through the Federal era Jason Russell House Parlor

Although the tour is compelling, tour guides seem to struggle with these idiosyncrasies. A well-thought out furnishings plan can be combined with an interpretive plan. With careful study of Jason Russell’s, as well as other probate inventories, the house should be directed at becoming a better reflection of the home of an ordinary Colonial farmer. Objects that have remarkable provenances should be woven into the tour as well as being featured as set-pieces to make up completed rooms. Objects of uncertain provenance only serve to reinforce the other objects that do have provenance and a “story” to tell and give a better picture of what an average Colonial farmer’s house would have looked like.

b. Museum Displays



14 The current exhibition "Family Ties" has been on view since 2007

The Smith Museum was completed in 1981 to fulfill the need for a fireproof storage facility for Society collections and to exhibit objects from the collection. The current exhibition “Family Ties” was installed at the time of the bicentennial of Arlington becoming an independent town in 2007 and describes six families and their impact on Arlington’s history.

Although this permanent display is well crafted and the theme is finely honed and relevant to many audiences, it does not draw repeat visitors

because it does not change. Even large museums have found that they cannot make it alone on static “Permanent Exhibitions” unless the venue is a large tourist draw, with a constant influx of new visitors. The Smith Museum has space for changing exhibitions that could bring repeat visitors and improve ownership and enthusiasm on the part of the members and lead to more visitor-ship and support.

GOAL:

- Changing Exhibitions: Begin implementing a program for changing exhibitions in the Smith Museum space. Because self-curated exhibitions take time and effort, grant funds should be sought and a limited number can be presented each year. A rotating exhibition schedule could coincide with those offered traveling exhibition programs targeted towards smaller institutions, which include programming grants (such as “NEH On The Road” and Smithsonian’s “Museum on Main Street”). Plan special events and coordinate lecture series with these exhibitions to more fully integrate all Historical Society programming and drive visitation.

c. **Programs** –



15 A well-attended lecture in 2014

The ongoing lecture series hosted by the Arlington Historical Society is open to membership and the general public. Each series runs from fall to spring and is based on a theme that is developed in the summer. The series is well planned with diverse presenters on each topic, and is very popular. It is currently one of the best ways to keep members involved.

The Society could improve offerings, not by changing the series, but by offering supplemental programs to broaden base of support. Special events for fundraising should also be sought.

GOALS:

- Complete an IMLS Public Perception program: This assessment, part of the Museum Assessment Program, is supported by the Institute of Museum and Library Services and the American Alliance of Museums. It is designed to help museums assess their strengths and weaknesses and plan for the future. It involves self-study, and a site visit by one or more professionals in the field. The end product will be a thorough assessment of the Society’s relationship with the community as well as the community’s perceptions and experiences with the Society.
- Improve communication outreach: The main way that supporters are reached is through an e-newsletter (615 recipients) our Facebook page (294 Likes), our website (about 1,800 average monthly visits), and yearly distribution of our program brochure (600 mailed or otherwise distributed). Explore ways to maximize these audiences and keep them.

- Complete a yearly Annual Review: Begin creating an annual review of Society activities that is made available to all donors. This will consist of a distillation of yearly financial info from the Treasurer's report, along with other facts and figures and highlights from the previous year. This will be a way to communicate more with our supporters, give them some ownership over Society activities, and keep them abreast of what is happening behind the scenes. This also gives us an easy document to send to potential foundation donors, information we can glean for various proposals, and a concise record of each year.



16 A smaller program held in the Smith Museum

- Branding and Visual Identity: Contract for a professionally designed logo and color scheme that is consistent across all platforms so that the “message” that is sent is consistent.
- Fundraising Event: Plan and carry a special event for fundraising and solicitation of new members: such as a seasonal fall festival or wine tasting. Fundraising event should tie in with a local history theme.

IV. FINANCE

The Financial operation consists of three main areas:

1. Financial Management: Budgeting, monitoring and paying expenses; processing income; investing savings; filing tax and other fiduciary forms; ensuring accuracy and integrity of accounting records and procedures.
2. Fundraising: Finding the money to allow AHS to fulfill its mission, in the form of grants, special events, major donations, new income streams.
3. Trust Funds: The Society maintains an endowment totaling around \$850,000 as of the end of 2013, actively managed by an outside firm, under the direction of the elected Board of Trustees.

The 2014 operating budget does not include capital expenditures or major repairs and renovations. We have one permanent part-time employee working 24 hours/week and a part-time resident caretaker, with remaining duties staffed by volunteers and outside contractors as required.



17 Many modern descendants of Jason Russell visit the site each year

Approximately 55% of the budget is funded by income from the Trust Funds, 15% from admission fees and rental from the resident caretaker, 11% from membership dues, and the remainder from donations.

SUCCESES:

AHS is debt-free, and has been able to meet its most basic financial obligations for operating expenses (staffing, utilities, insurance, office, program, publications, and maintenance of the historical collection) through stable investment income, donations, admissions and membership fees.

CHALLENGES:

1. At present, only one volunteer elected Treasurer handles all aspects of Financial Management, including filing all tax returns, while a Vice-Treasurer handles the memberships. A larger team should be developed to share the work, check for errors, and provide internal audit capabilities.

2. While our current budget is sufficient for every day operations, it is not able to support the extensive repairs and restorations needed to maintain the integrity of our primary historical property, the Jason Russell House. A full restoration of the foundation and first floor support structure was quoted as up to \$1.2 million.

GOALS:

- Fundraising Plan - Form a plan to raise funds needed to repair and restore the Jason Russell House properly.
- Finance Committee - Create a Finance Committee with sufficient talent to accomplish our goals, working as two teams:
 - a. Financial Management: Working with the Treasurer, take responsibility for the Society's financial management and other financial activities such as:
 - Investigate opportunities to secure an earned income stream aside from donations (e.g. rentals, photo rights)
 - Explore investment and endowment-building strategies
 - Establish financial/bookkeeping/accounting policies and procedures
 - Prepare and monitor annual budget;
 - Oversight of wage & hour regulations for any paid staff or consultant;
 - Maintenance of the books, filing of tax returns, and preparation of financial statements according to sound accounting principles.

b. Fundraising: Establish and implement annual fund-raising goals and plans, including a long-range plan for a major restoration of the Jason Russell House, and building the endowment.

- Donor Estate Planning: Better communicate to supporters how they can include the Society in will bequests
- Business Partnerships: Explore partnerships with local businesses
- Board Development – Recruiting and training: Training and orientation of board members – for both museum/non-profit training but also fundraising. A strong board should participate in fundraising as well as management and should be trained in how to do so.
- Increased Staffing: Work toward having the equivalent of one full-time staff person for administrative work. This makes it possible for many more funding options.



18 Silhouette of Reverend Samuel Cooke, 1708-1783

Conclusion:

Our ad hoc Strategic Plan committee never explicitly set a time frame to accomplish the goals in the Strategic Plan, it is understood that some issues such as restoration of the JRH will take many years. Our current ways of doing things such as membership recruitment and fund raising is also going to have to change. Detailed plans will be drafted by the various committees and task forces and be reviewed by the board with the Chairs of those committees before implementation. Committee chairs will report progress to the board on a monthly basis at regular board meetings. We will assess progress six months after the board approves the Strategic Plan.

The Strategic Plan is a living document and will need to be updated yearly or as circumstances change