



THE IMPORTANCE OF PAST AND PLACE TO WHAT LIES AHEAD



WAKE FOREST
UNIVERSITY

OCTOBER 23, 2018

**Report to Wake Forest University on the
University's Relationship with the Wake
Forest Historical Museum**

EXECUTIVE SUMMARY

This report was commissioned by Wake Forest University (WFU) to investigate how the university should conceive of its future relationship to the Wake Forest Historical Museum (WFHM) in the town of Wake Forest, N.C., the birthplace of the university in 1834.

There is no better time for us to understand and appreciate how the past informs our future.

- Dr. Nathan O. Hatch,
Wake Forest University
Commencement, 2017

The relationship already is mutually beneficial. The Wake Forest Historical Museum has long hosted an annual visit to the original campus by faculty, students, and alumni. It also hosts retreats, conferences, and continuing professional education in cooperation with various university departments. The university supports the Wake Forest College Birthplace Society, the museum operator, by providing two positions on the university payroll and maintaining the historic structure interpreted by the museum. A federal-style plantation house (c. 1820) known as the Calvin Jones House, the structure served as

one of the first buildings used by the college, which was named for the plantation (the town of Wake Forest grew later under the same name). The university has also donated toward a museum building (2011) that includes an exhibit on the college's history until its move to the Reynolda campus – the current WFU "main campus" – in 1956.

The investment by WFU has clearly had an impact in comparison with other small, community-based museums. The museum has enjoyed long-term leadership and steady growth in educational and archival programs, community outreach, and visitation, now approximately 10,000 annually. All told, the museum is ready to respond to new possibilities, as the museum's board of directors have expressed in a recent strategic plan.

Project leader and author of this report is Elizabeth Watson, Class of '74, WFU Distinguished Alumna '17, Class of '74, working with Mary Tribble, '82, MALS '19 of the alumni engagement department. Watson is a strategic planner and principal in Heritage Strategies, LLC, with a consulting practice in historic preservation that requires knowledge of museums, heritage tourism, and community planning. They collaborated with an outside panel of experts that included Assistant Provost Allison Perkins, Reynolda House president; Frank Vagnone, CEO of Old Salem and Twisted Preservation, a cultural and museum consulting firm; and Elizabeth Chew, Vice President for Museum Programs at Montpelier, an institution leading the nation's conversation on the legacy of slavery at the Virginia home of James Madison. In preparing this report, the team interviewed over 50 individuals representing faculty, administrators, volunteers, museum leadership, the Histories of Wake Forest Committee and local and state historic preservation planners.

This report recommends a phased approach for enhancing the relationship of the university and the museum, so that the museum would become integral to the WFU academic mission and engage its current students, faculty, and alumni in richer, more extensive ways. It briefly describes a status quo option but notes that this is not congruent with two important features of university life at this point in

time: the university is revisiting its heritage through the Histories of Wake Forest initiative, and it sits on the brink of the planning phase for the commemoration of the Wake Forest University 200th anniversary in 2034.

Thus, this report focuses on a “Defining Vision” phase involving university-led experimentation with programs to deepen WFU involvement. Faculty would teach courses and the museum would provide educational services for university-sponsored programs for students, alumni, and the public. Both would engage in more research and both would support the Histories of Wake Forest Committee as it examines the WFU relationship to slavery, stemming from its origins in Wake Forest, N.C.; archeological exploration is a possible part of this research.

The report also sets forth a second phase that would evolve from approximately five years of work in the earlier phase, calling for a greater commitment by creating a robust academic program. The Defining Vision phase should be designed to create conditions for the longer-term vision to emerge through building creative programs and cultivating supportive constituencies.

There are three main areas of inquiry described in this report relating to the history and future of Wake Forest University: American history; community evolution and civic engagement; and institutional evolution, especially the role of leadership and character in that evolution.



From the Worrell House in London and Casa Artom in Venice, to WFU Charlotte Center, and Wake Washington Center, WFU has creatively adapted old and new properties to fulfill its mission to be “a place where exceptional teaching, fundamental research and discovery, and the engagement of faculty and students in the classroom and the laboratory are paramount.”¹

Similarly, the resources of Wake Forest, N.C., offer significant potential as a living laboratory academic inquiry into civic, community, institutional, and Southern history. Using the museum as a locus for place-based education can provide a forum for an interdisciplinary approach that employs the power of place for research, teaching, and constituent engagement.

Programming at the site should be a model of dynamic inquiry, one that invites faculty, visitors, and scholars to explore many questions that relate directly to the shape of present-day institutions. With imagination and resources, the university can transform the Wake Forest Historical Museum from a static site of nostalgic pilgrimage to a dynamic and vibrant place of research and learning that fulfills the university’s mission.

With imagination and resources, the university can transform the Wake Forest Historical Museum from a static site of nostalgic pilgrimage to a dynamic and vibrant place of research and learning that fulfills the university mission.

for

¹ <http://strategicplan.wfu.edu/vision.mission.html>

INTRODUCTION

This report was commissioned by Wake Forest University in the summer of 2018 to investigate how WFU should continue its relationship to the Wake Forest Historical Museum² in the town of Wake Forest, N.C., the birthplace of the university in 1834.

This report recommends a phased approach for enhancing the relationship of the university and the museum, so that the museum would become integral to the university's academic mission and engage its current students, faculty, and alumni in richer, more extensive ways.

Although it is not the objective of this document to evaluate the museum and its programs, it is worth noting that the entire institution is admirable and an asset well worth growing. This is recognized in the preamble to the 2016 agreement described below, where the parties state that "both WFU and the Birthplace Society are pleased with the current operations of the Facilities and would like to see further development thereof, which, they mutually agree, requires support from WFU and other sources."

WFU investment and support has clearly had an impact on the WFHM, especially when compared with similarly-sized museums in communities of comparable size. In particular, growing WFU annual support over the last fifteen years has provided a bulwark against the unpredictability of local fundraising. This factor has clearly enabled the hiring of top-flight, long-term leadership and steady growth in educational and archival programs, community outreach, and visitation, now numbering about 10,000 annually. All told, the museum is clearly ready to move to a new level, as anticipated by the museum board of directors in a recent draft strategic plan.

No fact or incident which pertains in anywise to the history of a great institution is unimportant. We should gather up every crumb of reliable information. By doing so we will give due honor to those that have gone before us and secure the gratitude of those who will follow us.

- Dr. Charles E. Taylor,
Wake Forest College president,
1884-1905

RELATIONSHIP OF WAKE FOREST UNIVERSITY TO THE WAKE FOREST HISTORICAL MUSEUM

To date, Wake Forest University has been involved with the Wake Forest Historical Museum largely on the strength of its traditional ties to its former location. This has long included an annual "trek" to the

² The title of this report is taken from a portion of the vision statement from the Wake Forest College Birthplace Society. We are additionally indebted to the society for the introductory quote from Dr. Hatch.

original campus by faculty, students, and alumni. In recent years the museum also has hosted a Deacon Camp for incoming freshmen. The museum hosts retreats, conferences, and continuing professional education in cooperation with various university departments and faculty; and is a livestream site for area alumni and friends for the annual broadcast of the WFU Lovefeast.

The WFU Office of Alumni Engagement (housed within University Advancement) has overseen this relationship, supporting the interests of what were once many alumni and faculty with ties to the Original Campus. Maintaining those ties to retain the interest of a dwindling audience of individuals who once learned and taught on the former campus, however, is a mission that needs re-thinking.

A WORD ABOUT TERMINOLOGY AND TIMELINE

Discussing concepts in this report has resulted in a particular vocabulary for key places and entities. Following are phrases and explanations for the reader to bear in mind, along with a brief timeline:

- **“Wake Forest N.C.”** – in verbal usage, this helps distinguish when a speaker is referring to the town, and not “Wake Forest U” or just “Wake Forest.”
- **Original Campus** – sometimes called the Old Campus, “Original Campus” is considered more contemporary. This is the site where Wake Forest University was founded in Wake Forest, N.C. Actually the town was named after the college, which was named after the plantation purchased in 1832 by the Baptist State Convention of North Carolina to establish the Wake Forest Manual Labor Institute in 1834. Construction of school buildings began there as early as 1835; the Institute became Wake Forest College in 1837.
- **Reynolda Campus** – the site in Winston-Salem, N.C. of Wake Forest University today. The college was moved here in 1956 and became a university in 1967. No longer often called the “new campus.” WFU also has other campuses; especially worth noting is Wake Downtown, recently built in the heart of old Winston-Salem to house undergraduate engineering education/initiatives and the Bowman Gray Center for Medical Education. The medical school held its first class in Winston-Salem in 1941.
- **Wake Forest Historical Museum** – the museum complex in the historic residential Wake Forest, N.C. neighborhood north of the Original Campus. It occupies approximately five acres granted for this purpose by the university in 1956. It includes the Calvin Jones House (c. 1820), which was moved in 1956 to the current site and listed in 2016 in the National Register of Historic Places, and a 7,000-square-foot facility (2010) with a large permanent exhibit, meeting space, offices, and archival space (individually, called the **“museum building”** – a naming opportunity awaits). Though largely devoted to interpretation of Wake Forest College, alumni, and faculty up to the move of 1956, the Wake Forest Historical Museum also interprets the town of Wake Forest. We recommend against referring to this interpretive site as “the birthplace” – for a shorter reference encompassing the entire complex and its organization, we use **“the museum.”**
- **“Birthplace Society”** – the 501(c)(3) nonprofit organization that owns and oversees the operations of the Wake Forest Historical Museum. Full name: Wake Forest College Birthplace



Society. It was established to lead the preservation and interpretation of the Calvin Jones House in 1956, soon after the local garden club called upon the Southeastern Baptist Theological Seminary, the new owner of the Original Campus, not to demolish the building.

- **Wake Forest Historical Association** – a group sponsored by the Birthplace Society that is devoted to the history of the town of Wake Forest. Members may belong to both groups, or only one. The association is not formally a nonprofit but benefits from the Birthplace Society's nonprofit status and has applied for grants and raised funds through the society's sponsorship. The two organizations maintain separate bank accounts.

WAKE FOREST UNIVERSITY SUPPORT FOR THE MUSEUM

Since the 1990s, the university and museum have developed a formal relationship involving significant WFU support. This relationship has been defined in the 21st century by an evolving written agreement with the Birthplace Society, most recently negotiated in March of 2016. The agreement is renewable every three years. University support falls into four categories:

- **Donations:** In 2006, the university donated \$350,000 to the 2007-2012 capital campaign for the museum building. The town of Wake Forest donated \$500,000.
- **Legal Structure:** The university retains an ownership right in the museum property, technically a reversionary clause should the current uses cease, under the terms of a 1963 title conveying the land to the Birthplace Society.
- **Staffing:** Through the written agreement, the university provides payroll and benefits for employees: a full-time executive director and a part-time assistant director. The museum relationship is managed through Office of Alumni Engagement within University Advancement; thus museum staff report to that office. A portion of the staffing costs, however, comes out of the Office of the President.
- **Facilities:** Through the written agreement, the university provides hazard insurance for the buildings. The university also provides routine and major maintenance for the Calvin Jones House, but not the newer museum building.

The university is also the guarantor of the mortgage associated with the museum building, which in early 2018 was approximately \$250,000. Language in the 2016 agreement makes clear that the university is concerned about this debt and its potential impact on the museum:

If during any time during which WFU is providing operating support to the Birthplace Society (1) it becomes apparent to WFU in its fairly exercised discretion that the Mortgage Debt is impacting the operations of the Facilities to an extent which precludes the operation of the Facilities ("Restricted Operations") in a first-class manner as at present and in a manner of which both of the parties can be proud; and (2) the Birthplace Society has complied with the terms of this Agreement [cross reference omitted], WFU will take such action as it deems appropriate to reduce the negative impact of the Mortgage Debt to the extent required to again permit operation of the Facilities in a first-class manner as at present [additional terms concerning financial review and use of society reserves omitted] (Agreement, paragraph A(b)).

Other Museum Support

The Birthplace Society raises funds for the museum annual budget of approximately \$200,000, separate from the staffing and facility needs supported by the university. The museum budget is noticeably low considering the extent of operations and programs, thanks in part to substantial volunteer involvement by the society's board and members. The town of Wake Forest provides a stipend of approximately \$4,000 each year, roughly equal to the electric bill for outdoor lighting. The university provides a modest amount of fundraising guidance through its advancement staff. There has not been a concerted fundraising effort since the campaign for the museum building in 2006. There is no substantial endowment for the museum; reserves consist of approximately \$500,000. There is approximately \$325,000 pending in unmatured estate gifts.

WHY THIS REPORT, AND WHY NOW?

On February 27, 2018, Mary Tribble made a presentation to the Wake Forest University Budget Committee, with two objectives: (1) establishing a museum educator position (we suggest the title of program director), with funding for that position to come from outside the University Advancement office; and (2) orienting the committee to the idea of developing a "larger and longer term strategy" for the university and the museum.

Can we reimagine the museum as an academic asset that advances the university mission, particularly as it both grapples with and celebrates its past?

She raised two timely issues as part of the discussion: (1) the impending retirement of the museum executive director, expected in approximately two years; and (2) the Histories of Wake Forest Committee explorations into the university relationship to slavery, stemming from its origins in Wake Forest, N.C.

She concluded her presentation with these goals:

- The museum can be a key asset that helps the university advance its mission, particularly as it both grapples with and celebrates its past;
- It can be a center for research, programmatic and academic activity that connects our past with relevance today; and
- It should be in the hands of academic and history professionals who can shepherd it into a successful future.

As a result, the committee supported enlisting a panel of experts to explore these and other questions and provide advice to the university. The committee deferred any decision regarding support for an additional position at the museum until completion of this study and recommendations detailed in this report.

A Further Factor – Histories of Wake Forest Committee

The Histories of Wake Forest Committee was first convened in 2015 by WFU Provost Rogan Kersh. This was in response to questions that arose with the intention of the Z. Smith Reynolds Library (ZSR) to teach an online course on the history of Wake Forest University. Reviews of the preliminary syllabus by

a panel of three historians (Randall Hall, Craig Friend, and Wanda Hendricks) advised against developing a celebratory recounting and “mythologizing” of known facts.³ Their written evaluations provide direction for an intriguing, evolving course of study requiring research and the development of many facets that could be shaped over multiple semesters and classes.

Brief historical research documented in a June 2016 memo by Z. Smith Reynolds Library administrators Lynn Sutton and Tim Pyatt and the museum executive director, Ed Morris, persuaded the committee to endorse the hiring of a historian for an in-depth look at Wake Forest College involvement with slavery, including its faculty and administrators, many of whom were slaveholders. WFU has not been asked publicly or by students and faculty to pursue this history – it is voluntary on the part of faculty and administrative participants in the committee. Historian Andrew Canady is currently conducting this research, which will provide additional detail that can be incorporated into pursuit of recommendations provided below. Shortly after the formation of the Histories of Wake Forest Committee, WFU joined Universities Studying Slavery (USS), a consortium of universities investigating their own connections to slavery and its legacies.

Members of the committee and other members of the faculty participated in meetings held by Ms. Tribble and Ms. Watson at the end of June, 2018. Among other topics, a key point raised – but not resolved – is how to present the university’s historic roots – to focus only on slavery, or to study it within the entire context of the institution’s founding? The committee also expressed strong interest in the legacy of slavery relating to the development of the Reynolda Campus and downtown Winston-Salem. Both involve support from the Reynolds family, whose Reynolds Tobacco company has roots in the slaveholding past of company founder R.J. Reynolds (born 1850). The committee urged outreach to descendants related to both Wake Forest and Winston-Salem as a part of any initiative to uncover and interpret stories of enslavement.

Related to stories of enslaved workers in Wake Forest, N.C., the Wake Forest Baptist Church contacted the Wake Forest Historical Museum about moving a small antebellum building that was thought to be a slave dwelling from its property to the museum site. Ms. Watson and the panel incorporated this possibility into the work leading up to this report. As explained in an appendix to this report, not enough is known at this time to suggest such an interpretation of this building, not to mention the radical step of moving it. It is, however, potentially an artifact from the earliest years of Wake Forest’s founding (plantation, college, and town) with stories well worth investigating through archival and archeological research.

³ Undated memo by Friend, p. 1.

RECOMMENDATIONS

There are two overarching options the university could pursue with regard to its relationship with the Wake Forest Historical Museum: (1) maintain (or retreat from) the status quo; or (2) embrace the museum's potential as a site for place-based learning and reimagine its role as a center for academic inquiry. In this part of the report we explore each option in detail.

Option One: Maintain (or Retreat from) the Status Quo

Maintaining the status quo or retreating from its current level of support is an option that the university should consider carefully:

Retreating from support will likely jeopardize the museum's future.

- **Retreat:** Retreating from support will likely jeopardize the museum's future. While the site and its managing entity have been well-operated, small house museums across the country face challenges in terms of sustained public and private support, audience engagement, and the changing tastes of visitors. University support over the past 20 years has been the "thumb on the scale" – together with vigorous local leadership – that has enabled the museum to address such challenges and positioned it for next-level programming.
- **Status quo:** If the museum maintains its current programming, its relevance to the university will continue to weaken as the alumni base from the old campus dwindles. Status quo support based on this relationship is a poor use of university funds when even a modest increase in WFU support and engagement would garner a higher return on investment.

The status quo has evolved for reasons of rich tradition long valued by the university. Three urgent reasons for near-term decisions and actions signal likely shifts in the status quo and an opportunity to move the university away from Option 1:

- **(1) Impending staffing changes:** The retirement of the museum executive director (and with him, two full-time volunteers) in approximately two years provides an opportunity to address museum staffing as it aligns with university priorities. Neglecting to address this upcoming departure will create a crisis that forward planning can avoid. The Birthplace Society strategic plan calls for the establishment of a new position (program director), which could be filled now, with the intention of establishing a succession plan for the executive director position.
- **(2) WFU Histories initiative; (3) WFU anniversary:** Maintaining the status quo is not congruent with two important features of university life: the university is revisiting its heritage through the Histories of Wake Forest initiative, and it sits on the brink of the planning phase for the commemoration of the Wake Forest University 200th anniversary (1834). A more robust investment in the museum could enable it to be a crown jewel of the celebration.

Option Two: Reimagining the Role of the Original Campus (Defining and Long-Term Visions)

The second option is to leverage this unique artifact to continue the WFU tradition of innovative, place-based learning rooted in the liberal arts and reimagine the role of the Original Campus as a center for academic inquiry.

From the Worrell House in London and Casa Artom in Venice, to WakeCharlotte, WakeDowntown, and WakeWashington, WFU has creatively adapted old and new properties to fulfill its mission to be “a place where exceptional teaching, fundamental research and discovery, and the engagement of faculty and students in the classroom and the laboratory are paramount.”⁴

The Wake Forest Historical Museum and the town itself offer significant potential as a living laboratory for academic inquiry into civic, community, institutional, and Southern history. Using the museum as a locus for place-based education can provide a forum for an interdisciplinary approach that employs the power of place for research, teaching, and constituent engagement.

The Wake Forest Historical Museum and the town itself offer significant potential as a living laboratory for academic inquiry into civic, community, institutional and Southern history.

For the museum, this suggested approach looks beyond a model of “received wisdom” where simply stepping onto a historic site is expected to imbue the visitor with knowledge impelled by nostalgia. Rather than commemorating the past in static way, programming at the site should be a model of dynamic inquiry, one that invites faculty, visitors, and scholars to grapple with the

difficult questions that shape our present-day institutions.

Themes

Within the simple, often-told narrative of Wake Forest’s founding are the seeds of more complex themes that are as relevant to American lives today as they are to the study of WFU roots.

We see three main areas of inquiry as they relate to the history and future of Wake Forest University: American history; community evolution and civic engagement; and institutional evolution, especially the role of leadership and character in that evolution.

Academic subjects that intersect with these themes include politics, business management, entrepreneurship, sustainability, law, economics, education, sociology, religion, history and American studies (Southern, women’s, African-American, Jewish, industrial, architectural history, etc.), public history, museum studies, social justice, American literature, and the arts.

⁴ <http://strategicplan.wfu.edu/vision.mission.html>

Let's examine the way these possibilities might be found at the museum, the Original Campus, and Wake Forest, N.C.:

1. American History

The practice of chattel slavery: The plantation economy of the upper South and the practice of slavery; and its echoes in issues surrounding today's accounting for its effects on the accumulation of capital by institutions founded before the Civil War ended slavery in the United States.

Education in the early Republic: The social and political transition from the American Revolution to the early Republic; especially the development of education, particularly higher education, in the South and across the new United States, as Americans sought means of ensuring that democracy would survive.

Religion in the early Republic: The Second Great Awakening and the place of the Baptists in the "democratization of American Christianity" (the title of Dr. Nathan O. Hatch's celebrated book on the topic, although Wake Forest itself plays no role in his narrative, published in 1989). While profoundly a rich, historical story expressing the same transition to the early Republic as the theme of education, this also involves populism, strands of which continue to play out in American politics.

The economics and demographics of growth and settlement in the early Republic: Patterns of American growth set in motion in the early 19th century remain discernable in the United States today; there was a pronounced "east versus west" tone in the times around Wake Forest College's founding, in the Age of Jackson. The nascent "North versus South" cultural shift solidified later; the River Mill at Falls of the Neuse, a paper mill founded in 1856, offers a counterpoint to the dominant narrative of the agrarian South versus the industrializing North. Calvin Jones's sale of his plantation to move west to Tennessee was an important indicator of the times, as is his earlier story as doctor, mayor, soldier following his move to North Carolina from Massachusetts after the Revolution. While Jones has no direct role in founding the university, he was important to Wake County history and his biography offers a unique path for understanding local history in the early Republic. First college president Samuel Wait and other college leaders offer equally intriguing personal details in the evolving story in Wake Forest reflecting American trends.

2. Community Evolution and Civic Engagement

Community evolution: The evolution of Wake Forest as a plantation, then campus, then town, an intriguing tale of community development, is in part based on geography and transportation. Understanding that story today could be the foundation for a further process of exploring such political science topics as urban planning, the future of local government, and the relationship of local policy to state and federal policy. For example, Jones's 1823 ad in *The Raleigh Register*, seeking to sell his Wake Forest plantation, remarks that "this was once the main Northern and Southern stage road and probably will be again, in which case it will be the most public road in the State" – a most prescient observation, as U.S. Route 1, the great north-

south route through North Carolina prior to the construction of I-95, once went through the campus. The Raleigh and Gaston Railroad, chartered in 1836, was the second to be built in North Carolina, on land ceded – purposefully – by college trustees. It remains part of an important north-south route destined to become part of a 21st century high-speed rail line.

Civic engagement: Small towns today are responding to changes in their regions and serving their populations in a variety of ways, from celebrating local history to addressing demographic and social changes through urban planning and a wide variety of local government actions. The town of Wake Forest offers a living laboratory for scholars and students seeking to understand local business and economic development and 21st-century evolution of social structure, government, and political action at the community level.

3. Institutional Evolution, Leadership, and Character

The institutional evolution of Wake Forest University: Wake Forest University has evolved from the early educational concept of a manual labor institute in the antebellum South, as far as the United States has moved from its agrarian Colonial roots. The university has progressed through many stages – as manual institute, then college, then its transfer to Winston-Salem, then as university. It emerged from roots deep in the 19th century to become a leading institution of higher education nearly 200 years later. An intriguing artifact from this evolution is Lea Laboratory (1888) – the college at just 50 years old conceived and built one of the first chemistry labs in the South. Decisions to establish the law and medical schools reflect important social changes around the turn of the 20th century. In examining this history, Wake Forest University has an opportunity for self-reflection on institutional culture and cultural tradition, as well as moral and educational leadership. How did the university make critical decisions, all in the context of the rise of the United States through wars, industrial development, and 20th-century modernity?

The evolution of leadership and

character: How do leaders shape an institution, and how does an institution shape its leaders? Front-page stories in the past year have highlighted the conflict that elected, institutional, and civic leaders face regarding the evolution of leadership and character. As the moral and ethical context of leadership evolves

in American society, how do institutions grapple with their legacies? Many of the college's founders, first faculty members, and trustees were slaveholders, yet they were considered honorable and moral leaders of their time. Viewed through a contemporary lens, however, these early leaders, as well as later WFU faculty and administrators who promoted eugenics and promulgated white supremacy, invite deeper reflection. The museum can provide a meaningful backdrop for consideration of these difficult topics.

The Defining Vision phase is designed to meet immediate needs of both the university and the museum while creating conditions for the long-term strategy.

Option 2, Phase 1: Defining the Vision

Reimagining the role of the Wake Forest Historical Museum can be implemented in two phases. The first phase is designed to meet immediate needs of both the university and the museum while developing long-term strategies, building incremental programs, and cultivating constituencies. This involves establishment of academic programs representing the university in an all-embracing, interdisciplinary manner, far beyond the museum's current ambitions for educational outreach.

It is possible that this version of Option 2 could be an endpoint and the result of modest upgrades to leadership, investment, and experimentation. We prefer, however, to hold out the hope that a well-executed phase of work defining the complete, long-term vision would result in a much richer product. While it may be difficult to describe this longer-range result in detail, dedicated work toward such vision-setting would create more compelling involvement in this early phase.

Components of the Defining Vision phase are as follows:

1. University-driven educational initiatives

The museum can provide space and guidance to enable the university to serve students, faculty, alumni, and continuing education audiences in the town of Wake Forest and the entire Triangle area. While the original campus is just two hours away, distance from the Reynolda campus is a challenge to be addressed. We don't envision asking a Reynolda-based class to "commute" regularly to the original campus; rather, we recommend using the Defining Vision phase to investigate a number of innovative, cross-campus solutions.

- **Academic Courses (1 to 3 credits):** The Departments of History, Study of Religions, Politics and International Affairs, Anthropology, Divinity School, and other undergraduate and graduate programs can offer short weekend classes as well as academic classes for summer sessions or spring break.
- **Digital Humanities projects:** There is an opportunity to create an internship project to digitize the museum's collection, thereby enhancing access to the objects for researchers on the Reynolda campus. This would encourage studies on material culture, and better connect the museum archives with ZSR Special Collections. Other projects could include digital mapping of the evolution of the built history of the Calvin Jones plantation to the college and town.
- **Internships:** Students studying public history, anthropology, or other topics could be employed over the summer or at other times of the year at the museum. This would be particularly interesting for students pursuing the Cultural Heritage and Preservation minor, which is growing.
- **Lifelong learning:** The popularity of the Lifelong Learning program in Winston-Salem suggests that select classes targeted to the greater Raleigh market could be successful

at the museum. WFU Associate Dean Tom Frank is interested in investigating class topics that could leverage relevant themes. The Alumni Engagement department will survey Wake Forest area constituents regarding topics of interest, and assist the Office of Continuing Studies to market the programs.

- **Interdisciplinary residential fellowships for research, writing and art making:** While this idea might be more fully developed in the long-term vision, it's possible to consider using the Calvin Jones House as a living space for a residential fellow.
- **Content-driven alumni events:** The Office of Alumni Engagement hosts an annual spring trek to the Original Campus that draws more than 200 alumni and 40 current students for a day of relevant educational programming. In addition to events like this, the department is rolling out content-driven programming for targeted audiences from the greater Raleigh market that could be hosted at the museum.

2. Museum-driven educational initiatives

The March 2016 agreement between the university and the Birthplace Society states among the obligations of the society:

The Birthplace Society agrees to work on increasing the interaction between the use of its Facilities and the history therein displayed on the one hand and Wake Forest University and its campus in Winston-Salem on the other, including uses of Facilities by WFU and its affiliates on a regular and ongoing basis and programs generated by the Birthplace Society *to be presented at the campus in Winston-Salem for the information and enjoyment of faculty and students there* with respect to the deep history of the College and its relationship to the current mission of WFU (emphasis added).

The growth of WFU once it moved to Winston-Salem is not interpreted at either the university or the museum. Strategic deployment of more programming by the museum to audiences in Winston-Salem and beyond would add to the inherent messaging needed during the implementation of the Defining Vision phase and build additional interest in researching and programming at all locations. Possibilities of note include increasing the social media presence of the museum across the larger audience, collaborating with Z. Smith Reynolds Library on a Reynolda Campus lecture series, and installing a "Building Wake Forest" exhibit on the Reynolda campus.

3. Initiatives of the Histories of Wake Forest Committee

The work of the Histories of Wake Forest Committee likely will be long-term and far-reaching. While much of its early work has been focused on revisiting the university's history as it relates to slavery and its legacies, as one committee member remarked, "the Committee's larger aim was always to research and present a more inclusively honest history of Wake Forest, rather than the aspirational and mythological history that has been presented thus far." The Wake Forest Historical Museum can provide a canvas for expanding and interpreting the work of the

committee and that of historian Andrew Canady, bringing this research to light in a dynamic and engaging way.

- **Archeological Investigation**

We know from archival research that when it first opened, the college used former slave dwellings as student housing before the buildings were demolished (or possibly moved) in the late 1830s. Evidence of original buildings on the plantation may be found through archeological investigation led by faculty member Dr. Leann Pace. She has conducted a short-term archeological exploration at Hollins College that created a powerful experience for current students while helping to advance the college's study of its history. Such a project could be held with WFU and Southeastern Baptist Theological Seminary students and perhaps community descendants during spring break or summer session, providing an enriching experience for all participants.

- **Slave Dwelling Stay**

The Slave Dwelling Project, led by historian and slave descendent Joe McGill, has conducted 80 interactive stay experiences across the country, with the goal to preserve, and increase awareness about, the built history of our enslaved past. His interactive experiences are moving educational happenings for high school and college students, community members, historians, and descendants. An overnight stay under tents on the site of original Wake Forest slave dwellings could provide Wake Forest students with a powerful learning experience that could also include community members, descendants, and perhaps seminary students. In addition, Old Salem President and Twisted Preservation consultant Frank Vagnone conducts "One Night Stands" as a forum calling attention to historic properties across the country, and could be engaged to create an immersive event at the Calvin Jones House.



- **Virtual Historic Two-Campus Tour**



Through available software, the university can bring to life the history of Wake Forest at both locations. A virtual historic tour could be an ever-changing platform to link the histories of the two campuses, engage and interest students, faculty, and alumni, and bring historical research to life. Imagine taking a tour of the Reynolda campus and arriving on the steps of Wait Chapel. There, you read a short history of the building and hear the carillon play. Then, one click takes you to the exterior of Binkley Chapel at the Original Campus, which illustrates the similarity of architecture between the old and new. Step inside the vestibule of Wait Chapel and click on the portrait of Sarah Merriam Wait, and see a short video about how her conversion during the Second Great Awakening influenced her decision to share her calling with WFU founder Samuel Wait. Then, walk across the quad to the main administrative building,

Reynolda Hall. Read about its history, then watch a narrative about the 1838 administrative building at the Original Campus. Learn about the enslaved workers who built that original building, two of whom lost their lives in the process. The potential for rich and compelling content is enormous. The University Admissions department is currently reviewing its self-guided tour; a two-campus project could intersect with that effort. A second phase of this work could connect the Wake Downtown campus as well. This could potentially be taken on as a digital humanities project with students.

- **Visual and Performing Arts Interpretations**

The University of Kentucky is undertaking a project that offers a unique way to reflect on difficult institutional history. In response to student objections about a 1930s mural on its campus depicting slavery and other historical images, University of Kentucky President Eli Capilouto commissioned artist Karyn Olivier to



reinterpret the work through her contemporary artistic lens. The result is a stunning and thought-provoking artistic depiction on the dome of the university's Memorial Hall. This vibrant and inspiring approach of employing the arts could bring to life some of the early work of the Histories of Wake Forest Committee. A visual and/or performance art installation on the Original Campus, Reynolda Campus, and Wake Downtown could interpret WFU history as it was influenced by slavery and its legacies. This could connect the university's history, the arts community, and the greater Wake Forest, N.C., and Winston-Salem communities in a groundbreaking way.



4. Develop Constituencies

Implementation of the Defining Vision phase should unfold in the next two to three years. During this time, constituencies will be developed from these activities. Alumni representing classes other than those who graduated from the Original Campus will be drawn to signature educational programs. Faculty will begin to recognize the potential for research and teaching through participating in Lifelong Learning and short courses. Students (and their parents) will tour the Original Campus through a virtual experience and will link their interests to a wide variety of topics being explored in Wake Forest, N.C. Interested donors will become more aware of the research and learning opportunities. The town of Wake Forest community influencers will have more reasons to advocate for public and private support of the museum. Descendants of enslaved workers will be engaged through the work of the Histories of Wake Forest Committee. Through these intersecting interests and constituencies, the university and the museum will be laying the foundation for a broader, even more meaningful enterprise, the Long-Term Vision described below.

To implement the Defining Vision phase, we recommend the university commit to filling the full-time position identified in the museum strategic plan as soon as possible. The strategic plan identifies this as a

To implement the Defining Vision phase, we recommend the university commit to filling the full-time position as soon as possible.

“museum educator” position; we recommend this be renamed “program director.” This position would support current staff and volunteers in continuing current operations and adding initiatives identified in the strategic plan, such as internship direction, faculty collaboration and partnership development. More broadly, it would enable the museum to be responsive to growing possibilities for audience engagement as the university ramps up its dynamic educational initiative.

This program director could be interviewed and hired with the possibility of ascending to executive director role when the current director retires. While in this transitional phase, the university should reconsider the alignment of museum personnel within its administration and begin phasing in a long-term plan, as discussed further below.

In addition to staffing support, University Advancement should, in conjunction with the Birthplace Society board, focus fundraising activity on current-use gifts and estate planning directed especially toward Original Campus alumni. As the Defining Vision develops, we envision attracting a growing donor base to help bring the bold, Long-Term Vision to life.

It also is important to note that there is significant government (National Endowment for the Humanities, among others) and private foundation support for many of the initiatives summarized throughout this report. While analysis of funding potential is outside the scope of this report, many of these initiatives and programs could be highly attractive to donors. A bold and innovative vision will provide the fuel to gain support from a variety of donor bases

Option 2, Phase 2: Long-Term Vision

The Defining Vision phase on its own is a valuable solution for both the university and the museum. It would strengthen WFU student and faculty experiences, further the work of the Histories of Wake Forest Committee, and create new and meaningful opportunities for constituent outreach and engagement. The museum would enlarge its opportunities for engagement with a wider audience.

Thus, it is possible that the “end game” for this option is a more fully developed version of the Defining Vision phase. However, the university could aim for a larger and more impactful iteration of reimagining the Wake Forest Historical Museum as a place for academic inquiry.

Components of the Long-Term Vision are as follows:

1. An Academic Interdisciplinary Initiative

A long-term vision to enhance the Wake Forest Historical Museum is to create an interdisciplinary academic initiative. Imagine calling it, for want of a more specific name that must await more consideration and development, “The Center for the Study of Southern Institutions.”

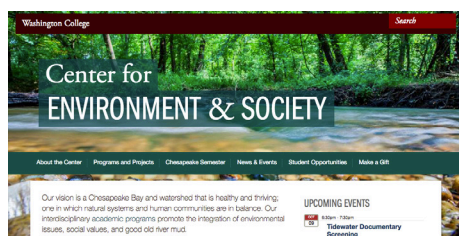
Institutions of higher learning establish such initiatives to focus research, teaching, student engagement, conferences and publications, public outreach, and donor support on a seminal topic or set of topics. Faculty often occupy endowed chairs accompanied by a budget and staff that allows greater outreach to support activities – which are double-branded by both the center and the university and build the reputations of both.

Establishing an academic program would expand interdisciplinary initiatives across campuses. It's important to note that we do not envision a Reynolda-based class “commuting” to Wake Forest, N.C. Faculty could be based on the Reynolda campus with support for visits to Wake Forest, N.C., that are designed to further initiatives that might originate at either location. While this program could evolve to a “Wake Away” initiative like Wake Washington, a semester-long residential element is not critical to success.

Establishing an academic program would both expand interdisciplinary initiatives across campuses.

The goal would be to create a nationally recognized academic focal point that furthers research and a curriculum built around the museum, town, and Original Campus. Programming could be developed from themes identified here or that may evolve from the Defining Vision phase. Such initiatives would enable the university to build partnerships with other academic institutions in the Triangle area, reach regional audiences, and develop Wake County-based learning opportunities for students.

As one example of such an academic center with a track record similar to the vision here (although more science-focused than history-focused), Washington College (the eleventh college founded in the U.S.; based in Chestertown, Maryland) founded the Center for



Environment and Society (CES) in 1999. The first CES academic leader was a renowned oceanographer and researcher who was retiring from government service. The fourth leader, named more than ten years ago, was a tenured member of the faculty and an archeologist who, among other initiatives, established one of the nation's earliest programs for Geographic Information Systems

(GIS). That program is now nationally recognized and has trained many students who have continued their studies at advanced technical programs across the country. The director also expanded the curriculum around interdisciplinary topics centered on environmental studies. He bought a research vessel, created labs, and began focusing on research and teaching based on their unique location on Chesapeake Bay, ultimately creating an interdisciplinary “Chesapeake Semester.” CES is now a significant element in marketing to potential students. The college recently committed to a much larger concept of distinguishing its offerings through an emphasis on Chesapeake Bay and building a new part of campus on the waterfront to support the program. Moreover, CES now offers consulting services to local governments on renewable energy and sustainability that involve both faculty and team learning opportunities for students. Although many of these ideas might have originated in bits and pieces with various

faculty and departments, creating them under the CES umbrella has given much greater power to the whole and created a different way for the college to relate to its environment, nearby communities, and researchers across Chesapeake Bay.

2. Institutional Organization

The future institutional organizational chart will be dependent on how the Long-Term Vision plays out in terms of staffing and activities. It is possible that the Calvin Jones House, for example, could transition from its current role as a public house museum to a place for research and learning activities. Alternatively, it might house fellows awarded a year's residency to write, perform research, or create art. It is also possible the new museum building could be adapted for more classroom use, or another facility could be developed through a public/private venture as described in the following section on facility evolution. These potential facility changes imply staff changes, which would inform organizational decisions.

While it is difficult to project the long-term needs and paths here, the university might look to the alignment of Reynolda House and consider ways to move toward more organizational parity, whether parallel and separate or combined. The structure is already similar, with Reynolda House museum leader Allison Perkins reporting to a university administrator, in this case WFU Provost Rogan Kersh, as well as a separate governing board. The university should examine the two different budget streams for the two current positions at the Wake Forest Historical Museum and consider streamlining, especially as recruitment begins for the new program director position.

Short-term changes in organizational structure should be reflected in the operating agreement with the Birthplace Society as it renews in 2019.

3. Facility Evolution

As the role of the museum evolves in the development of activities related to the Defining Vision phase, it will be necessary to assess the best and highest uses for the historic house, the current museum facility and perhaps additional facilities. There may be an opportunity to explore development of a conference center, perhaps jointly with the current owner, the seminary, using the old Simmons Hall, 115 East North Avenue. This sturdy brick Colonial Revival-style men's dormitory was built in 1936 and is among the main products of President Kitchin's building campaign in that era. The building is convenient to the museum as well as the campus. It is large enough to provide conference, classroom, and office space, plus a modest amount of overnight housing for students, faculty, and researchers.

This could be an innovative approach to public/private collaboration to lift up the university, the county, the town, and perhaps the theological seminary. There is substantial funding for tourism development in Wake County, for which such a project is likely to qualify. Moreover, because the building is a contributing building within an existing National Register historic district and the project would be for non-residential use and a multi-million-dollar project, it may be possible to syndicate available state and federal historic tax credits to a for-profit entity.

4. Planning for the University Bicentennial

2034 will mark the bicentennial of Wake Forest University. This milestone will provide countless opportunities to engage university constituencies in a variety of ways – not just in 2034, but at important junctures leading up to 2034. The planning for the bicentennial is larger in scope than this report can address, but certainly the Original Campus and museum should play a role in the commemoration. As the planning takes shape, the university should consider how it celebrates all of its learning sites, particularly the location of its founding in 1834.

IMPLEMENTATION

Should the Defining Vision phase be chosen by university leaders, following is an outline of steps for implementation:

1. Organization

- **Advisory committee:** Establish a WFU leader and a small committee of advisers to oversee the university-museum relationship. Set goals and establish criteria for success. Report regularly to the provost and senior leaders as needed.
- **Program Director and Succession Planning:** Confirm investment in the program director position by the university, outside of University Advancement. This position would report to the current executive director of the museum to advance the work of the Histories of Wake Forest Committee, the implementation of the Defining Vision phase, and serve as liaison to on-campus working committees. Ideally, this position would be recruited with the possibility that the candidate ascend to the executive director role when the current director retires.
- **Examine the University-Birthplace Society agreement,** to provide guidance for its next iteration in light of this new direction. Identify steps that might usefully be taken or at least negotiated ahead of 2020. Especially look carefully at the current mortgage.

2. Project design

- **Work program:** Outline a four-year Defining Vision work program identifying those who should be involved, to be updated annually. Based on that program, identify funds to allow the museum, faculty, and administrators to develop ideas for programs supporting the university relationship with the museum, the campus, and the town of Wake Forest. This could include funds for travel, research, internship stipends, course development, actual costs of teaching courses and providing other educational initiatives.
- **Address the involvement of the Histories of Wake Forest Committee,** which itself will need an outline to guide committee engagement in the development of the Defining Vision work plan. Some of the budget could be devoted to related work of the Histories of Wake Forest Committee, as appropriate.
- **Performance measures/evaluation:** The Defining Vision work program should include development of a written evaluation process that would be completed by the close of an initial period of the Defining Vision phase, suggested as five years. This process would refine

goals and set criteria for success, largely in terms of objective measurement of outputs (various kinds of classes taught, audiences reached, numbers of students involved, alumni and public programs achieved, etc.). Design of the process early would enable any desirable baseline measurements in the first year and be useful in record-keeping and reporting out to donors. In addition, the process should involve:

- Qualitative assessment of the progress in involving the university in the museum and local programs;
- Qualitative assessment of the museum's service to the university;
- Impact on student experiences and future educational and career decisions;
- Support for faculty research and achievements;
- Understanding of program impact on the WFU brand, including recruitment; and
- Greater awareness of Wake Forest history and the value of understanding that history and its relevance to the modern institution.



**Prepared by the Office of Alumni Engagement
in collaboration with Heritage Strategies**