



# ENGAGING DESCENDANT COMMUNITIES

**IN THE INTERPRETATION OF SLAVERY**

**AT MUSEUMS AND HISTORIC SITES**

A RUBRIC OF BEST PRACTICES ESTABLISHED BY

THE NATIONAL SUMMIT ON TEACHING SLAVERY

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**National Trust for Historic Preservation**

**African American Cultural Heritage Action Fund**

<https://savingplaces.org/african-american-cultural-heritage#>

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# INTRODUCTION

In partnership with the National Trust for Historic Preservation's African American Cultural Heritage Action Fund, James Madison's Montpelier convened the inaugural National Summit on Teaching Slavery in February 2018. Kat Imhoff, President and CEO of The Montpelier Foundation, stated that the summit represented "an important step towards creating a more honest and equitable version of history for future generations . . . . We are convening as an interdisciplinary workshop of peers with the concrete and important goal of creating a rubric for public historians to work with descendants." In that spirit, educators, curators, scholars, activists, museum and historic site practitioners, and descendants convened to deliberate on the best ideas and practices for teaching slavery in a more engaging and inclusive manner that incorporates the stories and experiences of enslaved people through the voices of their descendants. This rubric is an assessment and development tool that measures and builds an organization's capability and commitment to teach slavery.

In its most fundamental form, a "descendant community" is a group of people whose ancestors were enslaved at a particular site, but it can transcend that limited definition. A descendant community can include those whose ancestors were enslaved not only at a particular site, but also throughout the surrounding region, reflecting the fact that family ties often crossed plantation boundaries. A descendant community can also welcome those who feel connected to the work the institution is doing, whether or not they know of a genealogical connection.

Engaging descendants of enslaved communities forms a critical component of the rubric. Empowering descendant voices challenges the public to consider their points of view, which until very recently have been marginalized from the dominant historical narratives offered in classrooms, textbooks, museums, and historic sites. Beyond simply gaining historical information, institutions working respectfully with descendants can forge connections critical to their work. We hope that this rubric is viewed and utilized as a foundation upon which to construct richer, more diverse narratives that bring people to better understand the lived experience of slavery and its legacy, as well as to highlight examples of perseverance that carry descendants' legacies into the future. We hope it will continue to be revised as it is used and evaluated.

Recent events reaffirmed the sense of urgency and gravity of producing this rubric. While racist violence is a hallmark of American history, the tragedy that resulted from a white supremacist rally in Charlottesville (thirty miles from Montpelier) in August 2017 drew attention to the gaps in ethical education about the history and ongoing legacies of American chattel slavery, and the need for shared understanding of it. Numerous communities in the nation are wrestling with ways to address the presence of over 700 Confederate monuments, 551 of which were installed decades after the end of the Civil War as statements of white supremacy. A recent study by the Southern Poverty Law Center described the inadequate state of education in elementary and high schools regarding the teaching of American chattel slavery. (The authors of that study participated in the National Summit on Teaching Slavery). Yet, at the same time, several ongoing initiatives at historic sites like Montpelier, Monticello, Somerset Place, Stagville, and history museums like the Smithsonian

National Museum of African American History and Culture suggest better ways to engage the public in the painful topic of slavery and its lingering injustices while also building community. Motivated by a belief in the need for action, and confident that affirming truthful history can influence a larger public towards positive reconciliation, the Summit participants present this rubric to assist teachers, public historians, interpretation professionals, and descendant communities in addressing American history in a spirit of restorative justice and shared understanding.

The rubric provides a methodology for openly addressing the central role slavery played in the development of the United States, as well as its lasting impact on American society today, in ways that highlight our shared humanity. Drawing from lessons learned at museums and historic sites, in classrooms, and relying on current scholarship, the rubric is comprised of three pillars upon which to build descendant engagement: historical research, relationship building, and interpretation.

We see the rubric's emphasis on these three pillars as equally essential for museums and historic sites if they wish to engage effectively and ethically in much-needed truth-telling about slavery's role in the shaping of the United States, the legacy it continues to have on race relations in America, and the lingering institutional disparities that prevent all Americans from realizing the ideals expressed in our founding documents. Failing to tell the truth about race and slavery results in widely-held fears of engaging with people who look, speak, act, or think differently than oneself. It is lived out in anger and despair in feeling marginalized, erased, and invisible due to demographics or identity. It is experienced in the harmful effects of racism on the public's physical, mental, and spiritual health. And it is experienced tragically, violently, and fatally in Ferguson, Charlottesville, Charleston, and places in between.

The rubric contains definitions of key terms and concrete steps to affirm authentic history, make connections, and strive for dialogue in ways that encourage responsible, rigorous, and relevant encounters with the history of slavery, including difficult themes and traumatic legacies. The three pillars provide a foundation for authentic, effective, and sustainable engagement with audiences in a much-needed conversation that reveals the truths about slavery and its legacy. This rubric will assist institutions as they engage not just the public, but also their own employees, leadership, boards, and donors, who may have never heard these truths, and find them threatening to the ideals upon which they believe this country was founded, and more personally, threatening to their perceptions of themselves.

Embarking on this work has inherent risks and discomforts, but by using the rubric, institutions can better identify and manage risks. This rubric can help them avoid reactionary practices, and prevent them from knowingly or unintentionally contributing to an interpretation of history that provides inauthentic accounts and meaning-making that serves to alienate and traumatize visitors of color. As teachers of history, we strive to ensure a more inclusive narrative. This is a first step to that end.

## RUBRIC & EXPLANATION

The rubric evaluates the success of the institution in meeting the criteria through a ranking of 0-4 (0 being unsatisfactory and 4 being exemplary). In devising the rubric, Summit participants wanted to bring an organization through a staged analysis of its ability to engage with the descendant community. The rubric assumes that participants are already engaged with a descendant community and want to improve the relationships. As such, institutions engaging this rubric start at their current level and build from there.

The performance levels are listed from exemplary to unsatisfactory. The ultimate goal is a full partnership between the institution and the descendant community. By working backwards, we seek to lead the participants through a series of stages attainable by all parties (descendants, staff, leadership, and board) over time. It is essential that the rubric have entry points suited to a range of institutions with varying experiences and capacities.

Museums and historic sites should use this rubric to assess their current state of performance and define aspirational goals as they relate to organizational research. This can be difficult, as it requires a fair amount of introspection and a willingness to confront hard truths known and unknown about the organization. However, there is no predetermined starting point. What is important is to strive toward more equitable practice.

Of particular note is that as historic sites and museums progress along the rubric, descendants are increasingly inside the organization instead of outside. It is helpful to think of this work as true collaboration that will result in the institutional perspective of the museum being de-centered in favor of a descendant perspective. Descendants of enslaved people have not only been largely excluded from interpretation in museums, but when they are included, they are compartmentalized, tokenized, and used only when convenient. What does true collaborative practice look like? It may mean hiring descendants as researchers. It may mean asking first: "Do you want these stories told? What is important to you?" Open lines of communication are necessary to establish trust and collaboration. Without it, institutional perspective will dominate, and the opportunity for rightful inclusion of the descendant community is lost.

In all projects and in all departments, institutions must be humble and self-aware about their histories, their legacies, and their reputations. Working with descendant communities is about building trust and restoring justice. Working alongside descendants is critical to achieve innovative interpretation and field-advancing research.

**Remember:** *descendants can be your greatest resource - use this as a tremendous opportunity to learn.*

# I. MULTI-DISCIPLINARY RESEARCH

The study of slavery is fundamental to any understanding of American history. To effectively understand and present a comprehensive understanding of slavery in America, museums must engage as many avenues of inquiry as possible, and do so collaboratively with the descendant community. This means not only engaging with historical documents, but also including archaeological excavations, oral history, architectural history, and other forms of material culture analysis. This multi-disciplinary and multi-vocal research approach forms the basis of historical interpretation. Libraries, archives, museums, historic sites, and other repositories maintain abundant source materials in all these disciplines relating to the institution of slavery and the lived experiences of African and African American people in colonial America and the United States between 1619 and 1865.

A perceived lack of primary documentary sources is sometimes used as a justification for minimal slavery interpretation at museums and historic sites, with the argument that “we simply don’t know enough.” But even in the absence of documents written by or about enslaved people at a particular site, a creative and expansive approach to primary source analysis can ensure that interpreters incorporate stories of the enslaved into the interpretive narrative. Although sources have to be used and interpreted with care, this information is not “hidden.”

While significant information about the lives of enslaved people is available to researchers in libraries and archives, these materials can remain difficult for members of the public to access. The sources have a potential to create impactful and thought-provoking interpretation, yet institutions have allowed them to remain buried beneath the ground of the past, choosing to provide the public instead with partial truths. This is often the result of decisions made by institutions trying to protect the image of enslavers, or choosing to focus on elite culture and dominant narratives, rather than relating narratives that are more inclusive.

In addition to documentary research, other forms of research can deeply inform the interpretation of slavery, especially material culture studies such as archaeology and art and architectural history. These disciplines can provide important detail that historical documents rarely reveal, ranging from cultural practices, consumer behavior, relationships of power, landscape change and orientation, and diet, that aid in understanding the types of objects and possessions enslaved laborers used. Material culture disciplines also provide data for the lives of the people on a specific site, providing tangible, physical evidence of the presence of enslaved laborers through their possessions and homes, and the conditions under which they lived and labored. Additionally, these disciplines provide active opportunities for descendant communities to engage in the process of discovery, analysis, and interpretation.

Furthermore, although those who were formerly enslaved are now ancestors long gone, their descendants still have much to contribute to the research process in the present day. The rubric promotes a changed practice in cultural institutions, enabling public historians to work alongside descendants to research the past and tell compelling stories about enslaved people,

incorporating essential family oral histories, long dismissed as unreliable sources by many academic historians.

The accounts of what occurred, as recorded in letters, account books, plantation records, local newspapers, and other public records, all collectively create a body of information of historical significance. This data must be supplemented by the oral histories and other materials, such as genealogical records and family heirlooms that the descendant communities possess, to render whole a valuable and shared integral component of American history.

The Research rubric evaluates the ability of museums, historic sites and other institutions researching slavery and American history, to incorporate the needs and views of the descendant community in multidisciplinary research processes.

The criteria are organized into five categories: Sources and Methodology, Accountability, Multivocality, Accessibility, and Collaboration. Each of these categories is distinct, yet also interdependent. They are based on developing measurable goals that will result in the highest level of engagement possible between the institution and the descendant community. All institutions should evaluate their performance in these five key areas.

**Sources and Methodology:** *The sources and methods that the institution uses in performing research.*

**4) Exemplary:** The institution elicits questions of interest from broadly assembled forums of descendants and holds itself accountable to pursuing those questions through research that meets its professional standards of evidence, critically evaluated in the interest of inclusion. Uses a high number and wide variety of different written sources (e.g. letters, diaries, account books, plantation records, wills and other legal documents, census data, newspapers). Narratives include specific African cultural origins of the enslaved and the available evidence of resistance to enslavement to demonstrate human motivations and experiences. Uses sources to “read between the lines” (even documents that are not on the surface “about” slavery or enslaved people often contain valuable information). Genealogy, oral history, documents, archaeology, material culture, study of buildings, community research, and outreach are placed on equal footing. In the absence of specific sources, researchers employ comparative analysis to draw conclusions based on surviving evidence from comparable sites and the secondary literature.

**3) Proficient:** The institution uses a good number of primary sources from multiple perspectives. Connects with descendants through oral history and research, but does not involve them throughout the research process.

**2) Developing:** The institution actively uses genealogy to identify its descendant community. Uses only a few primary sources, but interpretation affirms that enslaved people led multifaceted lives. Engages with material culture and/or oral histories of the enslaved.

**1) Ambivalent:** The institution uses only secondary sources, and does not engage with any primary sources. Interest in engaging descendants around research, but no clear plan.

**0) Unsatisfactory:** The institution uses only hearsay and unsubstantiated anecdotes, and does not ground interpretation in primary or secondary sources. Interpretation may contain falsehoods about slavery or omit the topic entirely. No attempt to acknowledge descendants or involve them in research.

**Multi-vocality:** *The institution uses multiple sources and highlights multiple voices. Lifts up the voices and perspectives of marginalized people, especially descendants of enslaved people.*

**4) Exemplary:** The institution uses sources from multiple perspectives, and provides nuanced analysis of the impact of those perspectives. Incorporates the voices of the descendant community into the institutional voice. Recognizes diversity within the descendant community voices - local, national, international.

**3) Proficient:** The institution looks for fresh descendant community voices, and encourages new perspectives. Works with board and staff to build institutional platforms for shared authority.

**2) Developing:** The institution brings in multiple voices, but they are project-specific, with a subtle preference for institutional voice. Not much diversity within the descendant community involvement; reliance on engagement with the same few people.

**1) Ambivalent:** The institution has articulated that it wants multiple perspectives.

**0) Unsatisfactory:** The institution ignores descendant voices

**Collaboration:** *Building community with descendants by working together to achieve a common set of goals and objectives.*

**4) Exemplary:** The institution assesses community needs before beginning research, and conducts ongoing evaluation. Descendant community is part of active research, with a partnership in interpretive planning and organizing of exhibits.

**3) Proficient:** Any member of the descendant community with knowledge to share knows how to contact the institution. The descendant community is involved throughout the research process, but the institution is the final decision-maker.

**2) Developing:** The institution is doing work for descendants, but working towards doing work with them.

**1) Ambivalent:** The institution is interested in engaging descendants around research, but has no active plan.

**0) Unsatisfactory:** The institution does not acknowledge descendants or attempt to collaborate.

**Transparency and Accountability:** *The ability of the institution to be accountable to visitors and the descendant community, to own up to mistakes or omissions of the past, and to strive for transparency and truth-telling.*

**4) Exemplary:** The institution is transparent about the origins and context of the sources used. It reveals and shares research resources, and credits the descendant community. The descendant community is well-integrated and known by staff. The institution's work is timely and contributes positively to the field and to the descendant community. The institution acknowledges its own mistakes. The descendant community has access to research.

**3) Proficient:** The institution reports to the descendant community on a regular basis and has created a succession plan for staff members working with descendants. The descendant community knows the institution and is comfortable visiting.

**2) Developing:** Measures of accountability are defined but not followed. The institution informs stakeholders and visitors of ongoing research and is beginning to study its history.

**1) Ambivalent:** The institution has recognized the need for transparency and is open to it, but there are no clear steps.

**0) Unsatisfactory:** Lack of transparency; the institution does not acknowledge its mistakes.

**Accessibility:** *Giving access to research materials and resources to descendants and the general public, given that most primary documents and artifacts held onsite at museums, historic sites, libraries or other repositories are not circulated or made accessible to the public, unless those records have been digitized (which is expensive and rare). The institution is open and transparent in all things.*

**4) Exemplary:** The institution raises public awareness about the body of research. Restorative practice takes place through research, skill, and job training. The public has access to research and objects, with multiple entry points and delivery formats. Information is disseminated to the descendant community and general public; there is communication of research to all levels of staff.

**3) Proficient:** No digitalization of materials yet, but the public has access in person. The institution invites the descendant community to access its resources through events. Genealogy workshops and public programs engage the descendant community, but don't integrate them.

**2) Developing:** The institution has developed finding aids and desires to make information more accessible to the descendant community.

**1) Ambivalent:** Research and resources exist, but access is difficult.

**0) Unsatisfactory:** The institution purposefully denies access to research, especially for preservation of its reputation.



## **Conclusion**

All interpretation begins in research, and when discussing the history of enslavement, museum and historic site professionals do themselves and visitors a disservice by not involving descendants in research. Without their voices, research lacks depth, humanity and credibility, and institutions continue to perpetuate the exploitative practices of the past by privileging the perspectives of slave owners.

Many institutions have done meaningful work with descendant communities, including Montpelier and Monticello in Virginia, Somerset Place and Stagville in North Carolina, and Whitney Plantation in Louisiana. Institutions must consider descendants not as a supplemental part of operations or programmatic offerings, but as essential knowledge-keepers, experts, and advocates. Institutions can carry great personal meaning for descendants, and when descendants collaborate in research with the institution, those meanings can dramatically enrich or re-frame the interpretation. As stewards of public memory, public historians must actively collaborate with descendant community members in preserving personal family histories. Honoring individual narratives requires prioritizing the voices, stories, and perspectives of descendants in research and interpretation.

## **II. RELATIONSHIP BUILDING WITH DESCENDANT COMMUNITIES**

### **Introduction**

What is the ideal relationship between descendent communities and institutions that interpret slavery? Historically, the relationship between these two groups is complicated: many institutions have avoided interpreting slavery, often from fear of estranging donors or visitors. While these fears are valid, by not interpreting the lives of the enslaved, institutions fail to tell a complete story. This failure perpetuates historical and ongoing trauma to the descendants of those enslaved there, and to anyone whose ancestors were brought to the Americas during the transatlantic slave trade. When institutions shy away from creating relationships with descendants, the failure speaks volumes to the descendant community, especially as these institutions continue to profit from their ancestors' labor and pain.

Including descendants in research and interpretation is contingent upon building a positive relationship with the community. A positive relationship may already exist, but like all relationships, it must be maintained and nurtured so that it will grow. It is important to realize that the community is not a monolith—it includes a wide array of opinions, thoughts, and feelings about what can and should be done. It is also not static; as more genealogy and archival research is done, new people should be brought into the community as they are located or express interest.

If no relationship, or a negative relationship, exists, an institution should issue an apology or a statement. It is important to realize that not every descendant (or perhaps not any descendants) will want to work with a particular institution that suppresses their ancestors' pain and trauma. At any institution, it is important to respect and acknowledge descendant communities and approach these interactions with sensitivity, humility, and cultural, social, and emotional awareness.

Descendant communities and institutional partners begin by pre-determining a set of desired goals and outcomes that reflect the highest possible standards. Institutions must not only articulate commitment to these values and outcomes, but also follow through with strategic action. Achieving structural parity ensures that descendants are represented—and empowered—at every level of the organization, from the board to the volunteers. Institutionalizing these practices ensures continuity and longevity, while proactive evaluation supports quality control.

**Exemplary engagement epitomizes five key criteria:** High Standards, Expressed Commitment, Structural Parity, Institutionalization, and Proactive Evaluation.

**High Standards:** *The ultimate goal of cultural institutions is to provide audiences with valuable experiential learning opportunities. For institutions that interpret slavery, it is not enough simply to discuss the humanity and contributions of the enslaved. It is imperative that these institutions also unpack and interrogate white privilege and supremacy and systemic racism. Through innovation and collaboration, descendent communities can help institutions create transformative experiences that enhance cultural competency. Truthful and authentic storytelling can convey powerful messages that are both illuminating and uncomfortable. The entire organization should serve as a safe space for such sharing and discovery. This same culture of fearless storytelling and anti-racism must also be reflected in materials, programs, outreach, and partnerships. Only then will institutions and descendants have embraced the highest standards of collaborative engagement.*

**4) Exemplary:** As a result of significant and ongoing anti-racist training (which includes interpreting difficult history, deconstructing and interrogating white privilege, white supremacy, and systemic racism, and engaging visitors on these subjects), the staff is transparent, truthful, and authentic in all relations and interactions with the descendant community. Interpretation is conceived to emphasize the humanity of the enslaved ancestors and to evoke empathy from visitors.

**3) Proficient:** All staff have received anti-racist training, interpretive staff receives ongoing training.

**2) Developing:** Front-line staff have been trained once.

**1) Ambivalent:** Select staff have been trained once.

**0) Unsatisfactory:** No staff have been trained.

**Expressed Commitment:** *One important way institutions can powerfully and publicly express commitment to descendant communities is by articulating it in their governing and planning documents: mission statements, by-laws, and strategic plans. The institution can also create a written memorandum of understanding with descendants that explicitly outlines commitments and responsibilities.*

**4) Exemplary:** The institution explicitly expresses values of inclusion and anti-racism. The mission statement and by-laws reflect the presence, values, and interests of descendants. The strategic plan prioritizes engagement, equity, inclusion, and reparative financial investments. An interpretive plan actively seeks and embraces oral histories, and expressly values descendent relationships. The institution creates a written m.o.u with descendants that clearly outlines commitments and responsibilities, such as shared decision-making authority, asset co-management, and the adequate allocation of resources.

**3) Proficient:** There has been limited action toward achieving the exemplary model, with an informal plan of action, but no institutional self-evaluation.

**2) Developing:** The institution and descendant community have begun communication regarding commitment, but without a defined plan of action towards an m.o.u.

**1) Ambivalent:** Internal discussion about creating an m.o.u. has begun.

**0) Unsatisfactory:** No effort has been undertaken toward these goals.

**Structural Parity:** *Exemplary structural parity occurs when members of the descendant community are represented and empowered at every level of the institution – board, senior leadership, supervisors, junior staff, and volunteers. Representation goes beyond tokenism; these positions are invested with power and authority. Additionally, a descendant committee serves as a standing board committee; and targeted internships, mentorship, outreach, and partnerships (HBCUs, African American Studies programs, professional societies, etc.) exist to ensure a continuous, descendant talent/academic pipeline. The history of the enslaved community and the voices of their descendants are fully integrated into all of the institution’s materials and programs, including research, preservation, archaeology, and interpretation.*

**4) Exemplary:** Significant representation at each level has been achieved. Anti-racism training is provided for staff, board, and leadership. The institution reflects and considers all types of diversity (e.g. social, economic, geographic, knowledge, skills, etc.), and includes advisory voices.

**3) Proficient:** Board has structural parity, as described above, at the decision making level; there is parity in leadership staff.

**2) Developing:** Parity at junior staff level.

**1) Ambivalent:** Parity at advisory level only.

**0) Unsatisfactory:** Homogeneity in board, senior leadership, supervisors, junior staff, and volunteers.

**Institutionalization:** *Once a slavery-interpreting organization has established practices that are culturally competent and inclusive of the descendant community, making these practices systematic helps ensure their continuity and longevity. This requires ongoing dialogue and regular training and professional development for the entire board, staff, and volunteers. Partnerships with similarly-focused organizations can provide both accountability and inspiration. Institutionalization also means cultivating and sustaining relationships with patrons and donors who share the organization's mission and values, and are willing to invest in its advancement.*

**4) Exemplary:** The institution has established practices that are culturally competent and inclusive of the descendant community. Human Resources staff ensures ongoing diversity training of all staff through annual review. Board members and donors reflect the values of the institution. All practices are inclusive, with multiple opportunities for evaluation. Works closely with collegial organizations to share insight, inspiration, and resources.

**3) Proficient:** There is continuing exchange with collegial organizations and implementation of insights gained from this exchange.

**2) Developing:** Such a process is in development, beginning with reaching out to colleagues at similar institutions.

**1) Ambivalent:** There is sporadic informal engagement to exchange ideas, but it is inconsistent from one level to another throughout the institution.

**0) Unsatisfactory:** No attempt at institutionalizing these goals

**Proactive Evaluation:** *Exemplary descendent engagement requires ongoing evaluation that is both proactive and comprehensive. The goal of evaluation is to both continuously improve the ways in which descendent communities are engaged, and also to mitigate any concerns or problems that may arise. Evaluation should follow the PDSA (Plan, Do, Study, Act) Cycle model (see Appendix I). Through strategic goal setting, prompt follow up, reflection and, when necessary, change, institutions can nurture relationships that are constructive and meaningful for all involved.*

**4) Exemplary:** There is ongoing, comprehensive, and proactive evaluation of the ways in which descendent communities are being engaged - on the board, staff, and community levels - including follow up.

**3) Proficient:** The PDSA (Plan, Do, Study, Act) Cycle model begins, with regular attention to and evaluations of these goals.

**2) Developing:** Annual evaluation of descendant engagement practices.

**1) Ambivalent:** Less than annual evaluation of these practices.

**0) Unsatisfactory:** No evaluation.

## Conclusion

Building an institutional and personal relationship with descendant communities takes time, and should be done with attentiveness, care, and sensitivity. It is an institution-wide commitment and job, and cannot only depend on one person or one department. Ensuring structural parity is crucial, as is making sure the descendant community is familiar with multiple people and departments of the institution. Relationships are the foundation on which this work is done, and putting time, effort, and work into them is one of the most important steps an institution can take.

## III. INTERPRETATION

In January 2018, the Southern Poverty Law Center's Teaching Tolerance program released its report "Teaching Hard History: American Slavery." The report concludes: "The nation needs an intervention in the ways that we teach and learn about the history of American slavery." (Kate Shuster 2018: 40; <https://www.splcenter.org/20180131/teaching-hard-history>) While this assessment targets the teaching of slavery in America's schools, it is equally applicable to museums, historic sites, and other cultural institutions.

It is an understatement to say that museums and historic sites have an inadequate record of interpreting slavery and its legacies. Reasons range from outright racism to the more nuanced fact that we, as a nation, do not know how to talk about slavery and its legacies. It was not until the end of the twentieth century that many cultural institutions—even major sites—began acknowledging slavery, while still fewer interpreted the subject.

In the last decades of the twentieth century, most interpretation of slavery took the "segregationist" approach. Institutions often interpreted the histories of slavery and the enslaved as narratives outside the main interpretive story and focused on single or two-dimensional representations of enslaved men, women, and children, through their labor roles or a simple listing of documented names. Institutions failed to put the narrative of slavery into its proper place at the center of American history, and often failed to provide representations of enslaved people as multi-dimensional, complex individuals with agency, and with important identities beyond their labor.

Interpretation emerged as an important form of education at museums and historic sites after Freeman Tilden's groundbreaking book *Interpreting our Heritage*, commissioned by the National Park Service and published in 1957, spelled out six principles of interpretation (See Appendix II). Today the National Association for Interpretation defines interpretation as "a mission-based communication process that forges emotional and intellectual connections between the interests of the audience and meanings inherent in the resource." While both definitions still form a foundation for current interpretation practice, neither addresses the ethical responsibilities of institutions engaging in interpretation.

Since the beginning of the twenty-first century, museums and historic sites have sought to be more inclusive of the history of slavery. Even though institutions may desire to integrate their historic narratives and more accurately portray the

central theme of slavery in U.S. history, many do not know how. For example, institutions often struggle with interpreting the origins of race-based slavery in the United States, including the founders' use of the social construct of race to rationalize slavery, or the use of the pseudoscience of eugenics in the late nineteenth and twentieth centuries to justify racism, discrimination, and segregation. Some institutions are reluctant to address this history, while others are uncertain how to share it in ways that are ethical, meaningful and effective, with empathy for the enslaved, their descendants, and the learner.

Key to the integration of this history is engagement with descendants of enslaved people. Institutions should work to engage descendant communities in the interpretation process. Descendants should be central to the planning, development, implementation, and evaluation of all forms of interpretation, from programs to exhibitions. Engagement should be early, often, and ongoing. For many institutions, this is a dramatic change from simply surveying a community at the beginning or asking for feedback at the end. Community engagement for some institutions will be a difficult challenge. Building trust takes time.

**Summit participants identified six criteria to measure progress in better interpreting slavery:** Multi-dimensional Representations of People; Descendant Community Engagement and Collaboration; Institutional Commitment; Tools/Interpretive Techniques; Inclusive and Equitable Narratives; Audience.

**Multi-Dimensional Representations of People:** *At many institutions, interpretation mentions enslaved people only briefly, while providing extensive and detailed accounts of the lives of the white enslaver class. Institutions should ensure that interpretation of the lives of enslaved people provides the nuance, detail, and humanity afforded other historical figures.*

There should be provisions for making enslaved people visible—depending on the institution's venue. For example, for a white family's plantation or house, the living and work spaces of the enslaved should be visible and tangible as well. If visitors cannot see evidence of slavery, they will not ask questions about it, or pay attention to the message.

**4) Exemplary:** The institution develops a biography for each known enslaved person, tracing the arc of that person's life with as much detail as possible (recognizing that extensive details are not always available). The institution emphasizes the individual's humanity, not just his or her legal status as a slave. The institution affords each individual a complex identity (looking beyond their labor) and provides an intersectional analysis of their experience (discussing multiple aspects of their identity at the same time, including family members and other relationships). The institution acknowledges enslaved people's agency: how they shaped their own lives within the institution of slavery. The institution uses inclusive language that highlights the humanity of enslaved people and encourages visitors to empathize with them.

**3) Proficient:** The institution presents the life stories of several individuals and emphasizes their agency. There is reference to the humanity and complex identity of those in bondage.

**2) Developing:** The institution identifies individuals, but provides minimal background information. Alternatively, the institution provides one or more life stories, but the portrayals are one-dimensional and/or without discussion of agency (e.g. an enslaved manservant is discussed only in terms of his relationship with the master).

**1) Ambivalent:** The institution does not identify individual enslaved people. The enslaved community is referenced only in abstract terms (e.g. “the slaves,” “them”), or only in terms of their relationship to white individuals.

**0) Unsatisfactory:** The institution refers to enslaved people as “servants” or does not mention them at all.

**Descendant Community Engagement and Collaboration:** *As an institution develops and implements interpretation, it should involve as many stakeholders as possible in the process. Engaging members of the descendant community as equal partners is especially vital and highly recommended.*

**4) Exemplary:** Multiple stakeholders have a voice in the institution’s development and implementation of slavery interpretation. The institution’s engagement with descendant stakeholders is early, frequent, and sustained. The institution shares authority with the descendant community and privileges their perspective when making decisions about slavery interpretation.

**3) Proficient:** The institution engages and collaborates with different stakeholders consistently. The institution identifies the members of the descendant community as key stakeholders. Members are involved in some decision making.

**2) Developing:** The institution has identified key descendant stakeholders and engages/collaborates with them occasionally. Engagement may not be frequent or sustained.

**1) Ambivalent:** The institution’s engagement with descendant stakeholders is infrequent and primarily didactic, not collaborative. The institution identifies the descendant community but does not include members in decision making.

**0) Unsatisfactory:** The institution does not engage or collaborate with descendant stakeholders. Interpretation reflects only the institutional voice, not that of the descendant community or any other group.

**Institutional Commitment:** *A paradigm shift in slavery interpretation can only occur if the institution is committed to change at all levels and provides the necessary support to implement that change.*

**4) Exemplary:** A commitment to slavery interpretation is part of the institution’s strategic plan and mission statement. That vision and mission are communicated to staff, stakeholders, and visitors (this may involve a name change, such as the choice made by the Royall House & Slave Quarters in Medford, Massachusetts). Board and staff members (at all levels, from senior leadership to front-line employees) are involved in the process and receive appropriate training, professional development, or continuing education. The institution consistently dedicates the necessary budgetary resources and

staff time to implement more inclusive interpretation. The institution documents, evaluates, and measures its efforts to be more inclusive. The institution is committed to diversity and inclusion within the board and staff.

**3) Proficient:** Slavery interpretation is part of the institution's strategic plan, but is not included as a core part of its mission. The institutional vision is sometimes communicated to visitors. Most board and staff are involved and committed to change. Some budgetary and human resources are dedicated to the effort. The institution documents, evaluates, and measures its efforts to be more inclusive.

**2) Developing:** The institution has made progress towards greater institutional commitment, with some board and staff members committed to change. Interpretive efforts may be under-resourced (e.g. assigned to only one staff member) or non-central to the organization's mission.

**1) Ambivalent:** The institution's commitment to slavery interpretation is limited or sporadic (e.g. only offering slavery-related programming during Black History Month). Allocates limited resources towards such efforts.

**0) Unsatisfactory:** The institution's commitment to inclusive interpretation is perfunctory or nonexistent. The institution allocates no resources for such interpretation. Efforts to improve are met with overt dismissal or hostility.

**Tools/Interpretive Techniques:** *Interpretation can take many forms, such as exhibitions, tours, interactive and multimedia displays, websites, programming, and special events. Each type has its appropriate place, and when thoroughly employed, can work together to further the institution's goal of inclusive interpretation.*

**4) Exemplary:** The institution provides a rich variety of interpretive techniques to convey the history of slavery and race to visitors. The techniques are aligned with the institution's mission. Such interpretation is highly visible. The institution adheres to best practices for the development and implementation of each type of interpretation. Each tool is appropriate for the content and the audience, addressing different ages and learning preferences. Interpretation is offered in multiple languages and in accessible formats. The institution evaluates its interpretive tools regularly and uses the results to improve.

**3) Proficient:** The institution provides a good variety of interpretive tools. The interpretation is consistently aligned with the institution's mission. The institution conducts some evaluation of its interpretive techniques.

**2) Developing:** The institution provides some variety of interpretive tools, or a small number of tools that are employed extremely effectively.

**1) Ambivalent:** The institution provides little variety of interpretive tools. Interpretation is not consistently aligned with the institution's values or mission. Interpretation has low visibility.

**0) Unsatisfactory:** The institution uses a single type of interpretation that does not meet any other criteria discussed by this rubric.



**Inclusive and Equitable Narratives:** *Historian James Oliver Horton wrote, “Slavery was not a sideshow in American history. It was the main event.” Many institutions interpret slavery as a separate and secondary narrative—divorced both physically and metaphorically from the primary story about elite white residents. This is misleading and inaccurate, suggesting that it is possible to tell a truthful story that does not include slavery. When crafting their interpretive narratives, institutions must ensure that slavery is a significant thread that runs throughout.*

**4) Exemplary:** The institution’s primary narrative is inclusive (contains discussion of slavery/enslaved people) and equitable (the stories of enslaved people are given equal weight to those of the enslavers). The institution presents a multiplicity of perspectives within its primary narrative. The institution addresses slavery, race, and racism as complex concepts and provides local, national, and international context. The institution addresses the contemporary relevance of the history of slavery, race, and racism.

**3) Proficient:** The institution’s primary narrative is mostly integrated to include the stories of enslaved people. The institution includes more than one perspective in its primary narrative. The institution addresses the local, national, and international context of slavery.

**2) Developing:** The institution presents a substantial narrative about slavery, but on a parallel and separate track, not integrated into the primary narrative. The context of slavery is addressed only briefly.

**1) Ambivalent:** The institution presents some narrative about slavery, but it is not equitable with or integrated into the primary narrative. The context of slavery is not addressed.

**0) Unsatisfactory:** Slavery is not part of any narrative at the institution. Only a single story of elite whites is presented

**Audience:** *Interpretation does not occur in a vacuum: in order to be effective, all interpretive efforts must take into account the intended audience. Topics like slavery and race can be sensitive, for very different reasons. The institution recognizes that visitors will have a variety of reactions to the interpretation of slavery and has developed responses to the most common ones. Some visitors may feel defensive at difficult conversations about racism, privilege, and violence. Engagement with such visitors requires care to prevent them from “shutting down.” Others may feel frustrated at the way the institution presents slavery. Their perspectives can provide valuable feedback as institutions refine their interpretation in order to reach as many audience members as possible with their desired messages, leaving few unaffected. Understanding and responding to audience needs and concerns can ensure that interpretation is effective and impactful.*

Institutions must respect the fact that some descendants of enslaved peoples will choose not to engage with sites interpreting slavery, for reasons that may include ongoing trauma and anger, as well as general disinterest. Some descendants are not interested in being involved with or visiting a site where their ancestors were held in bondage. This does not mean the institution should

not attempt to engage descendants, but instead be aware of different negative or painful reactions that may arise, and be prepared to give people space, as well as to listen and respond to any critiques that may arise.

**4) Exemplary:** The institution consistently considers different audience perspectives and learning preferences as it develops interpretation. The institution engages in dialogue with visitors and provides ample opportunities for them to respond. The institution conducts research to identify the needs, interests, perception, and motivations of its audiences, using this information to identify problems and improve accordingly. The institution provides audiences a space for reflection and contemplation after engaging with difficult material.

**3) Proficient:** The institution considers its audiences as it develops interpretation. Staff members are trained in audience awareness. Visitors are given multiple opportunities to provide feedback. The institution occasionally measures and responds to its audience.

**2) Developing:** The institution identifies and tries to expand its target audience. Visitors are given a few opportunities to respond. The institution measures audience sporadically.

**1) Ambivalent:** The institution is aware of its audience demographics but allocates no resources to audience feedback or training interpreters to handle different visitor reactions to slavery interpretation.

**0) Unsatisfactory:** The institution is indifferent to its audiences' potential for being inspired by richer interpretation, viewing them as merely consumers of the narrative they choose to communicate.

## Conclusion

Descendant communities should be involved at all levels of interpretation and education. Their communities should be reflected in the institutional mission and value statements, with resources dedicated to sustaining such involvement.

Descendants should also be included in aspirational conversations about future site or interpretive planning, and in active exhibition or program development. When possible, descendants should be represented on staff, or compensated as consultants for their time and efforts. Institutional narratives should be inclusive of all contributors to the historical record, and should treat various types of primary sources with equity. Those narratives should reflect agency and humanity, cultivate empathy in visitors for the people of the past, and emphasize the relevance of history today.

Not all museums or historic sites are created equal. Disparities in funding and institutional commitment, the progress of previous research, staff awareness of and familiarity (or lack thereof) with existing communities or individuals, and prior institutional successes or failures in engagement, will all affect an institution's ability to engage with descendant communities to offer public programs or exhibitions that are ethical, inclusive, and relevant. However, an institution that makes no effort at engagement fails to fulfill its public and professional responsibilities.

## FINAL THOUGHTS

by Michael Blakey, Ph.D.

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The Rubric on Teaching Slavery represents a consensus of the thinking of a broad range of experienced professional site interpreters, scholars, and members of descendant communities, formalizing a methodology and evaluative criteria for true public engagement—an engagement with descendants that would allow accurate and equitable narratives of slavery and the enslaved. These solutions are the rational and ethical extension of ubiquitous conversations of the public at historic sites and museums. In the more than two decades since the term “descendant community” was drawn from language of the National Historic Preservation Act and first applied as an empowering handle for African Americans who rallied to dignify the New York African Burial Ground, a struggle for the human right to memorialize and tell their own stories has continued to grow. In some quarters “civic engagement” seeks little more than to co-opt communities into researchers’ and interpreters’ own narratives. In others, it seeks to enable an authentic dialogue about the past in a plural democracy in which descendants have a specific right to be heard and to benefit equitably from sites of their history, long denied them. This rubric is for the latter.

The fruits of conjoined interpretive and descendant communities are already apparent at some sites that have taken the long-view toward forging real, empathetic relationships and honest critical conversations over time. To try, face criticism, and invite it again represents commitment to an assumed shared humanity of self and other, without which no humane story of our collective ancestors can be told. The Summit reached out to incorporate representatives of many of the major United States’ historic sites, with differing experiences along the continuum of public engagement.

This document demonstrates how our best ideas and intentions can be executed to construct new history. We need a new history at plantation sites and museums where many of the previously told stories are now shown to be a conceited gloss on the past. Dishonestly uplifting for some. Denigrating to others. If future generations are to descend from more than this we must do things differently than before. African diasporic scholars have been saying this for a long time.

The new community of interpretation conjoined here represents listening. Although white Americans are divided, the Virginia General Assembly's *Remembering Slavery, Resistance, and Freedom Project* (2010-2015) showed that most want to know the truth. This rubric enables those who decide to tell it.

One hopes that given this clear road map, sites and the professions who run them, will proceed to the locations of shared power and voice with descendants. These are the locations of the democratization of knowledge, broad public interest, empathy, and growing markets. Thankfully, many organizations who participated in the Summit, have arrived at the location where they can begin to utilize the criteria of the rubric for its guiding support. We hope and expect that other foundations and funders will follow because descendant engagement, and the discussions and truths it allows, is the right thing to do.

This methodology is built for climbing, not resting. The inclusion of community "voices" or "assessing community needs" is not intended as the researcher's or interpreter's evaluation of what is important, but his or her acceptance of what is important to others; not only their feelings but their articulate research questions to be pursued. The international and other contextualization of the complex lives of the enslaved also includes grounding their humanity in the ordinary civic life of the African cultures from which they came. It would include the abundant evidence of their definitively human resistance to enslavement, which humanizes them despite its telling critique of the brutality of the white enslavement they resisted. The virtue of white forefathers and mothers will not stand unblemished by the human story of blacks which the Summit urges you to tell. Whites will have to be interpreted as human, too.

Over a century ago, Haitian anthropologist, Antenor Firmin wrote, "Man... achieves by making his own history." He was not describing false and fanciful narratives of the past. He, far more than the racist anthropologists to whom he was responding, believed in adherence to evidence. He meant we make history every day. That the future is in our hands. Perhaps our future best interpretations of the past will not come by the easiest process, but they will be our responsibility.

# BENCHMARKS FOR ENGAGING DESCENDANT COMMUNITIES AT HISTORIC SITES

	<i>EXEMPLARY</i>	<i>PROFICIENT</i>	<i>DEVELOPING</i>	<i>AMBIVALENT</i>	<i>UNSATISFACTORY</i>
<b>MULTI-DISCIPLINARY RESEARCH</b>					
Sources and Methodology					
Multi-vocality					
Collaboration					
Transparency and Accountability					
Accessibility					
<b>RELATIONSHIP BUILDING</b>					
High Standards					
Expressed Commitment					
Structural Parity					
Institutionalization					
Proactive Evaluation					
<b>INTERPRETATION</b>					
Multi-Dimensional Representations of People					
Descendant Community Engagement					
Institutional Commitment					
Tools/Interpretive Techniques					
Inclusive and equitable narratives					
Audience					

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## **Appendix I**

The Plan-Do-Study-Act (PDSA) cycle, based on the scientific method and derived originally in the business world, can be widely applied as a form of quality control to continually improve results in many enterprises. The detailed, four-step process tests a change that has been implemented within a real world setting, guiding the thinking process through stages of careful study. A team develops a plan, carries out the test, observes and learns from the consequences, and determines what further modifications should be made to the test, opening the way to further refinements. The cycle can continue indefinitely until the desired standard in process or product is achieved.

## **Appendix II**

Freeman Tilden's *Interpreting our Heritage*, first published in 1957 by the University of North Carolina Press, expressed the six principles of interpretation as:

- 1) Any interpretation that does not somehow relate what is being displayed or described to something within the personality or experience of the visitor will be sterile.
- 2) Information, as such, is not Interpretation. Interpretation is revelation based upon information. But they are entirely different things. However all interpretation includes information.
- 3) Interpretation is an art, which combines many arts, whether the materials presented are scientific, historical or architectural. Any art is in some degree teachable.
- 4) The chief aim of Interpretation is not instruction, but provocation.
- 5) Interpretation should aim to present a whole rather than a part, and must address itself to the whole man rather than any phase.
- 6) Interpretation addressed to children (say up to the age of twelve) should not be a dilution of the presentation to adults, but should follow a fundamentally different approach. To be at its best it will require a separate program.

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