

Candace Tangorra Matelic, Ph.D.

21 Mariano Road

Santa Fe, NM 87508-8787

843.655.0216 candacematelic@gmail.com



Professional Resume

OVERVIEW

Dr. Candace Tangorra Matelic brings more than three decades of leadership experience in history organizations and the academy to her work, teaching, and consulting. She directed National Landmark sites in Maryland and Hawaii and managed the visitor experience, interpretation and programs at the Henry Ford Museum in Michigan and Iowa Living History Farms. She led both the Santa Fe Children's Museum and Center for Contemporary Arts through critical transitions, leaving much stronger institutions. Candace's expertise lies in the areas of organizational analysis, change, learning and development, community engagement, transformational leadership, workforce development, public administration, mentoring and community-centered strategic/interpretive/program planning for museums and cultural organizations. She persistently advocates for meaningful public service, and valuing people, learning, and systems (capacity building) in organizations, and has raised more than seven million dollars during her career. Candace holds a Ph.D. in Organizational Studies, a MA in History Museum Studies, and a BFA (Fine Arts and American Studies). She held a tenured full professorship for ten years and directed one of the top professional training programs in the museum/heritage field—Cooperstown Graduate Program. She currently teaches for the University of Victoria, Johns Hopkins University, and the University of New Mexico, and is an active Rotarian.

Candace's consulting/planning work is distinguished by helping museums, historic sites, cultural organizations, community organizations, and educational organizations engage their communities as partners, and then fundamentally transform their vision, assumptions, organizational culture, and work patterns. She is sought after as an effective and transformative teacher, a visionary planner, a provocative speaker, and a skilled facilitator for community workshops, retreats and professional development gatherings. Candace has presented at more than 100 conferences in the US, Canada, and Europe, with 35 times as a keynote speaker or invited guest. Audiences find salience in her broad perspective and interdisciplinary analysis. Publications include two co-authored books, 34 articles or chapters, and an interpretive planning video. She has recently developed a series of planning tools for public and nonprofit organizations, and is working on a book about organizational change and community engagement in cultural organizations.

WORK EXPERIENCE: MUSEUMS, CULTURAL ORGANIZATIONS, and COMMUNITIES

President, CTM Professional Services, Inc., 1998–present. An independent business formed for consulting, teaching, and project management in the areas of: organizational analysis, change, development; and learning; strategic planning, community engagement; transformational leadership; strategic interpretation and public program planning, including dynamic visioning retreats and community engagement workshops, workshops on group dynamics, and creativity. Recent offerings include provocative keynote presentations “Tools for (R)Evolution,” “The Transformative Power of Community Engagement,” “Communities are Everyone's Business: Transforming Our Organizations and Moving Towards Sustainable Tourism,” “Thriving on the Edge of Chaos: Engaging Community and Transforming Our Organizations” and “In Search of the Heart & Soul in Museums.” Planning tools include: Tools for Organizational Transformation, Guidelines for Community Engagement, Strategic Interpretation and Program Planning, and Cardinal Rules for Visitor-Centered Historic Site Development. Recent CTM Professional Services projects in the areas of community engagement, organizational development, strategic interpretation, and program planning, and strategic/master planning (projects ranging from six months to three years) were completed (or are in process) for the following clients (SEE SUPPLEMENTAL SELECTED PROJECT DESCRIPTIONS):

- Los Alamos Historical Society, Los Alamos, NM
- Texas Association of Museums
- Texas Historical Commission
- Museums Association of Arizona
- Association of Nova Scotia Museums
- Alberta Museums Association
- New Mexico Department of Cultural Affairs
- South Dakota Agricultural Heritage Museum, Brookings, SD
- Amherst Historical Society, Amherst, MA
- Fortress of Louisbourg, Cape Breton, Nova Scotia
- Oliver Kelley Farm, Minnesota Historical Society, Elk River, MN
- Elfreth's Alley Association, Old City, Philadelphia, PA
- Historic Germantown Preserved, Germantown, PA
- Drayton Hall, National Trust for Historic Preservation, Summerville, SC
- The Homestead Museum, City of Industry, CA
- The Mill at Anselma Preservation and Educational Trust, Chester Springs, PA
- Tredyffrin Historic Preservation Trust, Tredyffrin, PA
- Naper Settlement, Naperville, IL
- The Design Center at Philadelphia University, Philadelphia, PA
- Cashiers Historical Society, Cashiers, NC
- The Mother Bethel Foundation, Philadelphia, PA
- The Wood Turning Center, Old City, Philadelphia, PA
- Longfellow's Wayside Inn, Sudbury, MA
- Hancock's Resolution, Annapolis, MD
- Historic Laurel Hill Cemetery, Philadelphia, PA
- New Mexico Farm & Ranch Heritage Museum, Las Cruces, NM
- Edsel & Eleanor Ford House, Gross Pointe, MI
- Old World Wisconsin, Eagle, WI
- Hancock Shaker Village, Pittsfield, MA
- Historic Tallahassee's Knott House, Tallahassee, FL
- Pennsbury Manor, PA
- Decatur House, National Trust for Historic Preservation, Washington, DC
- Chesterwood, National Trust for Historic Preservation, Stockbridge, MA
- South Street Seaport, New York, NY.

Executive Director, Center for Contemporary Arts (CCA), Santa Fe, NM, April, 2013–February 2015.
 After a 1.5 year period without a director, led CCA through a transition back to stability, vibrant improvements, and community engagement. Administered a budget of \$1 million. Worked with the board/staff to build a more sustainable operating model, including reducing debt, building the board, strengthening earned income to support visual arts, and supporting a robust portfolio (150+) of community partnerships and collaborations. Oversaw multiple capital improvements to upgrade facilities, including a successful capital outlay request to the state for some major repairs and improvements (\$97k). Planned and implemented the 35th anniversary (2014) celebration with many special activities. Directed a staff of 5 FT, 20 PT, and dozens of volunteers. Worked with Armory campus partner organizations to increase cooperation and collaboration.

Interim Executive Director, Santa Fe Children's Museum, Santa Fe, NM, June 2012–February 2013.
 Led this 29-year old Santa Fe anchor institution through a critical 9-month transition period after a number of tumultuous years. Identified an unsustainable business model, stabilized finances and grants reporting, and submitted numerous successful grants. Worked with board and staff to raise necessary funds to keep the

doors open and build a modest operating cushion (\$250k in 10 weeks) by going to the community for help. Established a “blue ribbon” task force to articulate a more sustainable operating model, initiated discussions with the City about a long-term partnership, and prepared a successful capital funds request to the NM legislature (\$117k). Worked to rebuild the board (added 8 new members). Coordinated outside partners and staff to build a new Makerspace (DIY innovation studio for older children), plan new programs, and build 3 new exhibits (secured part 2 funding, \$50k). Re-organized operations and re-established a development department. Led planning efforts, initiated new website development, and upgraded to a Web-based database. Worked with Armory campus partner organizations to increase cooperation and collaboration.

Founding Principal and Associate, The Cherry Valley Group, LLC, 2002–2005. A business to help cultural organizations find innovative solutions to maximize their organizational effectiveness. CVG helps clients to engage their communities through innovative interpretation, build relationships through collaborative exhibits and public programming, and strengthen their role as valued community partners. Founded company with three colleagues in 2002, served as CVG Principal, 2002-2004, and became an Associate in January 2005.

Executive Director, Historic St. Mary’s City Museum & Commission, 1997–1998. Responsible for 835-acre National Historic Landmark site, Maryland’s first capital (1634-1695), living history museum, exemplary archaeological research. Directed a staff of 45 full time, 30 part time/seasonal, and 50 volunteers. Administered \$2 million annual budget, worked with HSMC Foundation on fund raising, and worked with Commission on policy matters. Leadership results: new organizational mission and vision, goals, and new master plan to implement legislative mandate to function as an independent agency (directly under the office of the governor). Set up first independent Commission, with stronger board processes. Reinvigorated staff and community groups through participation in organizational decision-making. Strengthened infrastructure with new computer technology. Increased public programs, exhibits and public access to the site.

Executive Director, Mission Houses Museum, Honolulu, HI, 1994–1997. National landmark site, focused on 19th c. encounter of missionaries, Hawaiians, foreigners. Directed staff of 14 full time, 25 part time, and 35 volunteers. Administered \$750k annual budget, advised board on policy matters, and directed daily operations of historic site and library/archives. Leadership results: led staff and board strategic and long range planning, resulting in new vision to become community driven organization, major reinterpretation/restoration of historic houses, new exhibits, and new technological infrastructure. New vision and reinterpretation led to dramatic fund raising success: launched \$5 million capital/endowment campaign (\$3.6 mil. raised in first two years, including \$400k NEH Challenge Grant), IMS GOS support, and increased earned income. Conceived and implemented new community-focused programs (large themed festivals, Hawaiian language classes). Oversaw 75th anniversary celebration and AAM re-accreditation process.

Manager of Interpretive Training, Interpretive Programs, and Adult Education, Henry Ford Museum/Greenfield Village, Dearborn, MI, 1981–1985. Leadership results: Developed interpretive training program for 200-250 interpreters and 75-100 volunteers (introductory, advanced, special skills), new training manuals, staff/volunteers library, on-site interpretive signs and voice repeater scripts, and interpretive exchange program for staff development. Facilitated first curatorial involvement in interpretive research. Planned, supervised, and evaluated wide variety of programs, tours, special events, exhibits, on-site activities, seasonal programs, e.g., first large Halloween program, new summer day camp, evening programs, and annual school programs for 200,000 students. Ran large adult education program children’s classes—125-150 instructors; 400-500 annual offerings, in three annual terms. Served on the President’s Curriculum Committee (organizational assessment and articulation of future organizational direction).

Interpretive Specialist, Living History Farms, Des Moines, IA, 1978–1980. Leadership results: First interpreter training program for staff and volunteers, including *Interpreter Handbook* (230 pages), on-site

manuals for all exhibits, staff newsletter, and interpreter exchange program. Designed and photographed 96-page guidebook, and site brochure. Designed and installed first exhibit for Farm of Today and Tomorrow. Participated in development of volunteer program and youth interpreter program. Served as museum field liaison for Pope John Paul II's October 1979 visit.

ACADEMIC LEADERSHIP and TEACHING EXPERIENCE

University of Victoria, Cultural Resources Management Program. Offering a new graduate level distance course, *Social Engagement* (Spring 2015, 2014, 2013) Developed a distance course on *Public Programming and Community Engagement* for participants from across Canada, and worldwide. The semester-long course included ongoing facilitation of online dialogue with participants and guest speakers across multiple time zones; and individual email contact for feedback and problem solving. These courses utilize an interactive course site, Web resources, wiki, extensive study notes (overviews, study notes, learning activities and assignments, both team and individual) and numerous print resources. *Public Programming* offered Summer 2015, Summer 2014, Fall 2011, Fall 2010, Fall 2009, Fall 2008, Spring 2008, Fall 2005, Fall 2004, Fall 2003 and Spring 2003.

Johns Hopkins University, Museum Studies Program. Developed a new graduate level distance course, *Museums and Community Engagement*. This semester-long course included a blend of theory, case studies, and practical skills to begin an engagement journey, regardless of size, focus, or location of one's museum or cultural organization. Offered Fall 2015, 2014, 2013 and 2012.

University of New Mexico, Museum Studies Program. Developed and co-taught the introductory distance course in *Museum Practices* for the new Museum Studies Program, housed in the Anthropology Department. Course offered Spring and Fall 2015, Spring and Fall 2014, Spring and Fall 2013, and Fall 2012.

Association of Nova Scotia Museums, Museum Certificate Program. Taught *Museums and Community* immersion course (2 days + follow up assignment), 2014 and 2011.

Texas Historical Commission, Training for Texas Museums. Taught 10 day-long workshops, *The Transformative Power of Community Engagement*, at locations throughout the state, Spring 2011.

Eastern New Mexico University, Small Museums Pro! Program. Eight-week distance course, *Museum Administration and Leadership*, Fall, 2011. Eight-week distance course, *Crafting Effective Learning Experiences: Museum Education, Interpretation, and Programs*, Summer 2012.

Bank Street College of Education, Museum Education Leadership Program. Developed and taught an immersion course, *Tools for Transformation*, focusing on organizational change, competing values, transformational leadership, effective teams, group dynamics, using everyday creativity and innovation, organizational development and learning, and re-igniting individual and organizational passion, 2008.

Director, Cooperstown Graduate Program, and Professor (tenured) of History Museum Studies, SUNY Oneonta, and the New York State Historical Association, Cooperstown, NY, 1985–1994. Program administration for one of the top professional graduate training programs in the museum field. Recruited and supervised faculty (full time, adjunct and guest), staff, and students (150+ during my tenure). Responsibilities also included curriculum development for the two-year program, procurement and administration of financial aid, and public relations. Supervised student internships, counseling, and career planning and placement, and led regular weeklong field trips. Oversaw complex operating budget and facilitated coordination between CGP organizational sponsors, a state university and a private historical

museum. In honor of the Program's founder, established the Louis C. Jones Endowment for student fellowships, and raised initial support from 60% of alumni and friends. Led two comprehensive self-studies to revise mission, curriculum, program delivery (1987, 1993), and participated in ongoing academic reaccreditation processes. Developed and taught courses/seminars: *Museum Leadership; Education, Interpretation and Public Programs; Open-Air Museums; Public Speaking*, and *Group Dynamics*. Developed and directed a major field-wide conference on needs and issues of professional training that brought together institutional leaders (consumers) and directors of numerous major training programs (providers), along with funders, alumni, and students (1989).

University of Victoria, Cultural Resources Management Program. Developed and taught three immersion on-campus courses, *Connecting to Communities through Interpretation, Heritage Interpretation*, and *Public Programming: New Frontiers*. These intense six-day (48 hours of classroom teaching time) courses were offered in 2013, 2006, 2002, 2000, and 1991.

American Association for State and Local History (AASLH). Developed the very successful *Not Your Ordinary Workshop Series*, a mid-career training workshop program in 2000-2001. Set up advisory groups, coordinated syllabi development, recruited faculty, and led the pilot testing of four different workshops in leadership, collections, interpretation, and historic house administration. Developed four-inch binders of curriculum resource materials for each workshop.

American Association for State and Local History (AASLH). Served as Lead Faculty for *Interpretation Issues and Strategies*, part of the Not Your Ordinary Workshop Series. An intensive three-day immersion for directors, managers, curators, interpretive supervisors, and volunteers, covering all aspects of interpretation, including: foundational premises and principles, audiences, community and learning, visitor amenities, articulating interpretive significance and compelling themes, successful interpretive approaches and techniques, managing programs, staff and volunteers, and strategic thinking. Taught this workshop bi-annually around the United States, from 2002-2005.

Other courses and workshops include:

- Alberta Museums Association, *Embracing Transformational Leadership and Organizational Change*, full-day workshop, September, 2014.
- Texas Association of Museums, *Transformative Leadership*, half-day workshop, April, 2014.
- Association of Nova Scotia Museums, *Museums and Community*, two-day course with follow-up assignment, part of a professional certification program, 2014, 2011.
- Alberta Museums Association, *The Transformative Power of Community Engagement*, one-day workshop, 2013.
- American Association of Museums, *Organizational Learning in Action*, workshop, 2012.
- New Mexico Association of Museums, *Engaging Community and Moving Towards Relevance*, half-day workshop, 2012.
- New Mexico Department of Cultural Affairs, *Engaging Community and Moving Towards Relevance*, three full-day workshops (held in Albuquerque, Las Cruces, Santa Fe), 2012.
- Association for Living History, Farms, and Agricultural Museums, *Engaging Community and Moving ALHFAM Organizations Towards Relevance*, one-day workshop, 2012.
- American Association for State and Local History, *New Roles for Small Museums: Engaging Community and Moving Towards Relevance*, one-day workshop, 2012.
- Texas Association of Museums, *Managing Organizational Change*, half-day workshop, 2012.
- Mountain Plain Museums Association, *Managing Organizational Change*, half-day workshop, 2012.
- El Rancho de las Golondrinas, *Creating Meaningful Visitor Experiences*, half-day workshop, 2012.

- Texas Association of Museums, *Community Engagement: The Role of Directors and Trustees*, half-day workshop, 2011.
- Museums Association of Saskatchewan, *Community Engagement*, and *Tools for Transformation*, two half-day workshops, 2011.
- SaskCulture (provincial government), *Managing Organizational Change*, two half-day workshops, 2011.
- Cape Breton University, *From the Heart: Engaging Community and Interpreting What Matters*, one day workshop, 2010.
- Ontario Museums Association, *Tools for Organizational Transformation*, one and a half day workshop with pre and post online components, 2009.
- Association of South Dakota Museums, *From the Heart: Engaging Community and Interpreting What Matters*, one day workshop, 2008.
- American Association for State and Local History, *Walking Your Talk: Engaging Your Community*, half-day workshop, 2007.
- Association for Living History, Farms, and Agricultural Museums, *Strategic, Community-Centered Interpretation and Program Planning*, one-day workshop, 2007.
- The Homestead Museum, City of Industry, CA: *Effective Team Management*, two-day workshop, 2006.
- Ontario Museums Association: planned and facilitated an online dialogue for colleagues about *Public Programs that Matter*, 2003.
- Middle Tennessee State University: *Organizational Leadership*, Public History Graduate Program, 2000.
- University of Hawaii: developed and taught *Human Resource Management*, a four-day intensive immersion course for museum professionals, 1992.
- Office of Museum Programs and Education Division of the National Museum of American History, Washington, DC, *Reading Objects: Interpretation for Visitors*, workshop, 1989.
- New York State Historical Association: six-day seminar, *Interpreting Our Cultural Heritage*, Seminars in American Culture, 1987.
- Association for Living History, Farms, and Agricultural Museums: *Not Message but Method: Interpretive Training Exercises Focusing on Communication Skills*, workshop, 1985.
- Eastern Michigan University: graduate courses, *Historic Site Administration*, 1984; *Historic Site Interpretation*, 1983.
- Oakland University: graduate course for teachers, *How Museums Teach*, 1984, 1983.

Interpretive Skills and Awareness Workshops for Interpretive Managers and Staff: an interactive half- or full-day session exploring interpretation as a paradoxical communication process between museums and visitors, including participatory exercises to develop techniques of communication, sensitivity to visitor needs, and teaching with artifacts. Since 1979, offered this training session at more than 40 regional gatherings of interpretive staff and at individual organizations, most recently at El Rancho de Las Golondrinas, Santa Fe, NM, 2012-13-14.

Association of European Open-Air Museums: Organized an American delegation to join in special Congress of European Open-Air Museums, for the 100th Anniversary of Skansen, the world's first open-air museum, 1991. Developed and led a three-week tour of North American open-air museums for group of twelve Scandinavian museum directors and staff. Organized itinerary, made all arrangements, and served as leader/driver (3,500 miles), 1989.

EDUCATION

Ph.D., Organizational Studies, University at Albany, SUNY, 2007. Coursework in management, leadership, public administration, organizational behavior, theory, change, development, and learning, human resource management, nonprofit leadership, organizational sociology, and organizational psychology. Six courses in research methods and statistics. Total 62 credits, w/36 in public administration. **Dissertation, *Organizational Change in History Museums***, a comparative retrospective analysis of major change processes at seven museums during the last two decades of the 20th century. Research based on interviews with 77 people, 1706 pages of transcriptions. Thematic analytical framework emerged from the review of four organizational literatures: organizational change and development, organizational learning, transformational leadership, and nonprofit leadership and change. Analysis utilized a multiple perspectives approach to compare views of four advocacy groups. Participating museums: National Museum of American History, Henry Ford Museum/Greenfield Village, Minnesota Historical Society, Missouri Historical Society, The Strong Museum, Historical Society of Washington DC, and Detroit Historical Society. 430 pages. 3.9 GPA.

MA, History Museum Studies, SUNY Oneonta, 1978. Cooperstown Graduate Program, Cooperstown, NY. Coursework (1976-1977, 36 credits) in all aspects of museum practice, folk life studies, research, folk art. Thesis: field research on interpreter training programs at six outdoor museums (US and Canada). 3.9 GPA.

Hagley Program, University of Delaware, American History, Museum Studies, 1975-1976. One year of full time graduate work (21 credits) in history, material culture, and museum studies, with courses at Winterthur and Hagley Museums. Three-month internship at Old Sturbridge Village, summer 1976. 3.8 GPA.

BA, Fine Arts, University of Michigan, 1974. Ann Arbor, MI. **American Studies minor**, 129 credits, 3.6 GPA. Took graduate level courses in museum studies. Worked as interpreter at Henry Ford Museum and Greenfield Village during summers, weekends, and holidays, 1971-1974.

Other Professional Training: Eden Alternative Certification Training (transformational approach for working with seniors in assisted living facilities and nursing homes), 2003; AASLH Leadership Institute, 2000; Dale Carnegie Leadership (12-week course), 1996. Attended 15 professional seminars between 1978-1995 on subjects such as museum learning, leadership, management, historic site administration, development/fund raising, publications, interpretation, exhibits, and museum visitors with special needs.

Open-Air Museum Study Tour: Undertook self-sponsored four-month study tour of European museums, focusing on 22 open-air museums—itinerary included travel to 200+ museums in Sweden, Norway, Denmark, Germany, Holland, Belgium, Austria, Switzerland, Italy, France, Ireland, Scotland, Wales and England, Fall 1977.

PROFESSIONAL SERVICE

American Association of Museums, (AAM): speaker/ faculty for annual meeting, Museums Assessment Program reviewer (organizational assessment and public dimension), committees for professional training/ museum studies (COMPT), faculty for two professional development seminars. Completed major survey of museum studies graduates.

Association for Living History, Farms, and Agricultural Museums (ALHFAM): President (1985), board member, annual meeting program chair, local arrangements chair; bylaws committee, regular presenter and workshop leader.

Midwest Open-Air Museums Coordinating Council (MOMCC): Founder (1978), first coordinator, first president, conference keynotes, including MOMCC's 25th Anniversary (2004.)

American Association for State and Local History, (AASLH): two terms on Council, two terms on Executive Committee (secretary), annual meeting program chair, member of numerous committees, co-chair of national task force on professional training, faculty for workshops/seminars, Not Your Ordinary Workshop series developer/faculty.

Grant Reviewer: for Heritage Philadelphia Program, Pew Charitable Trusts, IMLS, and NEH.

Board Member: Motown Museum, Detroit, MI, 1985–2003, state museum associations, Hawaii and Maryland.

HONORS

John Schlebecker Award for Distinguished Service to ALHFAM and the open-air museum field, 1996.

MOMCC Candace Tangorra Matelic Award, created in my honor as the organization's founder/first president, for best annual essay related to MOMCC (Midwest Open-Air Museums Coordinating Council) and the museum field, 2003.

Who's Who in America, 50th through 69th editions, 1996–2015. Also listed in Who's Who in American Women.

Nominated as 2013 Santa Fe Business Woman of the Year.

COMMUNITY SERVICE

New Mexico: active member of the Rotary Club of Santa Fe (Paul Harris Fellow, Secretary July 2014 - June 2016, grants committee, Pancakes on the Plaza sponsor/volunteer, art foundation board member); volunteer for 5 years for interpretive training, special events, and special projects, and 2 years Renaissance Fair sponsor and NEH evaluator at El Rancho de Las Golondrinas (open air living history museum); Indian Market set up volunteer, for 2 years, weekly volunteer for 2 years at Bienvenidos (food distribution to the poor); statewide History Day competition judge.

South Carolina: CRS Coordinator (Community Rating System, FEMA National Flood Insurance Program) for Pawleys Island; Georgetown County Visions planning process; active on 2004–05 coordinating team to stop Lowe's and other big box stores from locating on the Waccamaw Neck, and preserve the distinguishing characteristics of place—successful community process with 900-1000 people attending Planning Commission and County Council meetings.

New York: Very active in St. Mary's parish: organized Ministry Fair, chaired annual picnic, initiated "Quiet Angels" recognition program, served as faith-sharing program group leader, Parish Council member, social committee member.

Maryland: St. Mary's City Community Advisory Council, Rotary member.

Hawaii: Honolulu Rotary member, statewide History Day competition judge, 7th–8th grades religious education teacher, St. Anthony's, Kailua, board member (VP, Fund Raising), Hawaii Youth Opera Chorus, Relay for Life Participant.

PUBLICATIONS

Strategic Interpretation and Program Plan for the Los Alamos Historical Museum, authored with team of staff and scholars, Los Alamos Historical Society, March 2015, 130 pages.

Book Review, of *Re-imagining Heritage Interpretation—Enchanting the Past-Future*, by Russell Staiff, for *Museum Management and Curatorship*, 2014.

Chapter, “New Roles for Small Museums,” focused on civic engagement, transformation, revitalization and relevance, for new AASLH Toolkit book series targeted to small museums, Chapter Six, *Audiences Book*, pp. 141–162, 2011.

Article, “Rooted in the Community: Transforming Practice to Increase Organizational Vigor,” *ALHFAM Proceedings of the 2010 Conference and Annual Meeting*, authored with Candace Lee Heald, Ph.D., 2011.

Article, “Does Effective Leadership Require Loyal Followers?” *ALHFAM Proceedings of the 2008 Conference and Annual Meeting*, 2009.

Article, “What Research Can Tell Us about Effective Teams,” *ALHFAM Proceedings of the 2008 Conference and Annual Meeting*, 2009.

Article, “Understanding Change and Transformation in History Organizations” *History News*, 63, 1, May, 2008, pp. 7–13.

Article, “Giving Community a Meaningful Voice,” *ALHFAM Proceedings of the 2007 Conference and Annual Meeting*, authored with Donna K. Sack and Beth Richards, 2008.

Planning Tool, *Cardinal Rules for Visitor-Centered Historic Site Development*, 2006.

Strategic Interpretation and Program Plan for Naper Settlement, Naperville, IL, April 2006, authored with Donna R. Braden and Donna K. Sack, 151 pages.

Strategic Interpretation and Program Plan for The Richard and Sarah Allen Center for Faith, Freedom, and Community, Mother Bethel Foundation, January 2006, primary author, two-inch binder of project reports and materials, 60 page summary report.

Strategic Interpretation and Program Plan for The Mill at Anselma, The Mill at Anselma Preservation and Education Trust, September 2005, primary author, 187 pages.

Article, “Organizational Change in History Museums,” summarizing dissertation research, *ALHFAM Proceedings of the 2004 Conference and Annual Meeting*, Volume XXVII, 2005, pp. 184–200.

Planning Tool, *Engaging Communities as Partners in Developing Museums and Historic Sites: Guidelines for the Process*, 2003 (revised 2004, 2005, 2006, 2007).

Article, “Mentoring Tradition,” summarizing empirical research on mentoring and its implications for the museum field, adapted from a 1997 report written for IMLS, updated with new research and interviews in 2000–2001. *Museum News*, 80, 6, November–December, 2001, pp. 44–49.

Article, "Professional Training That Works: AASLH's Not Your Ordinary Workshop Series," *History News*, January, 2001.

Article, "Tribute to Bill Alderson," *History News*, AASLH, Summer, 1996.

Chapter, "Forging a Balance: A Team Approach to Exhibits," team exhibit development process at the Museum of Florida History, Tallahassee, FL. *Images and Ideas*, AASLH publication, June, 1992, pp. 187–210.

Paper, "Overview of the Open-Air Idea in America, A Summary of Developmental Trends and Current Issues," 15th Congress of the European Open-Air Museums Association, Stockholm, Sweden, September, 1991.

Proceedings, Cooperstown Conference on Professional Training: Needs, Issues, and Opportunities for the Future. AASLH, Summer, 1990. Wrote introductions, overview address, and summary sections; co-edited with Elizabeth Brick, 128 pages.

Planning Tool, *Guidelines for Reviewing Public Programs*, AASLH, 1989–90, co-authored with Candace L. Heald.

Article, "Agenda for Our Future: The Challenge," *History News*, May–June, 1989, pp. 13–16, co-authored with Mary Alexander and Diane Jagodich.

Paper, "American Open-Air Museums: Types, Workmethods, Tourism," Report of the Congress of European Open Air Museums, Schweiz, 1988, Association of European Open Air Museums, 1989.

Article, "Museum Studies Programs: 1987 Survey Examines Graduates' Impact on Museum Field," *Museum News*, November/December, 1988, co-authored with Gail Anderson.

Article, "AAM Survey of Museum Studies Graduates: Summary of Results," *AAM Annual Meeting Sourcebook*, 30 pages, AAM, 1988, co-authored with Richard D. Chavka.

Introductory Chapter, *Museums & Folklife*, AASLH, 1987, co-authored with Dr. Louis C. Jones.

Article, "Living Historical Farms," *Henry Ford Museum & Greenfield Village Herald*, 14, 2, 1985.

Article, "Interpreter Training Comes Out of the Dark Ages: Method, Concept & Professional Exchange," *Museum Education Roundtable*, Summer, 1985.

Video, "Successful Interpretive Planning." Nashville, TN: American Association for State and Local History, 1984.

Article, "Taking the Eagle Tavern Back to 1850: Restoration, Interpretation, and Food," *Henry Ford Museum & Greenfield Village Herald*, 12, 1, 1983.

Chapter, "Interpreting the Lie of the Land, an Uphill Effort," *Working Papers: Historians, Artifacts and Learners*. Museum Reference Center, Smithsonian Institution, Washington DC, March, 1982.

Article, "Open-Air Museums and Community Interaction in America," published in Romania, July, 1981, through the International Communication Agency.

Guidebook, *Living History Farms, A Pictorial History of Food in Iowa*, co-authored with Jay Anderson. Des Moines, IA: Graphic Corporation, 1980, 96 pages.

Article, "Through the Historical Looking Glass," a history of open-air museums in America and their European counterparts, *Museum News*, March/April, 1980, pp. 35–45.

PRESENTATIONS, WORKSHOPS, SESSIONS

Keynote or Featured Presentations:

"The Transformative Power of Community Engagement," keynote presentation to the Museums Association of Arizona, followed by "Tools for Engaging Your Community," half-day workshop, May, 2014.

"Tools for (R)Evolution," keynote presentation for the Association of Nova Scotia Museums, September, 2013.

"The Transformative Power of Community Engagement," keynote presentation for the Alberta Museums Association Community Engagement Initiative, August 2013, followed by one-day workshop, December, 2013.

"From Chaos to Community Relevance—Tools for Creative Collaborations," keynote for the Museums Association of Saskatchewan, along with two workshops, Community Engagement and tools for Transformation, Saskatoon, May, 2011.

"Communities are Everyone's Business: Transforming Our Organizations and Moving Towards Sustainable Tourism," presentation to the Cape Breton Island community, sponsored by Shannon School of Business, Cape Breton University, Nova Scotia, June, 2010.

"Thriving on the Edge of Chaos: Engaging Community and Transforming Our Organizations," keynote presentation and day and a half workshop on organizational change management in museums, for the Ontario Museums Association, October, 2009.

"Learning about Organizational Change and Development," session for the Federation of State Humanities Councils Annual Meeting, Washington DC, November, 2008.

"A Living History Farm in Matthews, NC? An Exploratory Presentation," Matthews, NC Town Council meeting, October, 2008.

"Key Understandings about Organizational Transformation in History Organizations," conceptual overview for "super session" (double time slot) presenting the theme of the AASLH annual meeting, Rochester, NY, September 2008.

"In Search of the Heart and Soul of Museums," luncheon keynote, MOMCC 25th Anniversary Meeting, Green Bay, WI, November, 2004.

"In Search of the Heart and Soul of Museums," annual meeting keynote, Heritage League of Greater Kansas City, October, 2004.

"In Search of the Heart and Soul of Museums," annual meeting keynote, Connecticut League of Historical Organizations, Colchester, CT, June, 2004.

“In Search of the Heart and Soul of Museums,” plenary address, Small Museums Association Annual Conference, Ocean City, MD, February, 2004.

“In Search of the Heart and Soul of Museums,” keynote presentation, Arkansas Museums Association Annual Meeting, Little Rock, AR, March, 2003.

“Why, So What, and Who Cares? Attracting New Visitors Through Effective Interpretation and Interpretive Planning,” keynote presentation, Midway Village & Museum Center Interpretation Workshop, Rockford, IL, September, 2000.

“Human Resources in the Overall Institutional Plan: Staff Continuity and Organizational Strategy,” and “Non Cash Benefits and Incentives for Continued Service,” keynote presenter, AAM Seminar on Human Resources, Orlando, FL, February, 1995.

“Issues and Trends for Organizations 2000, with a Commentary on MOMCC’s Founding and Continuing Relevance,” keynote speaker, Midwest Open-Air Museums Coordinating Council Annual Meeting, Lansing, MI, March, 1994.

“Issues and Trends for Organizations 2000,” keynote address, Charleston Collaborative of Museums and Historic Sites, Charleston Museum, Charleston, SC, January, 1993.

“Collaboration and Organizational Growth and Change,” keynote speaker, Lower Hudson Conference Historical Agencies and Museums Annual Meeting, Monroe, NY, October, 1991.

“Overview of the Open Air Idea in America, Summary of Developmental Trends and Current Issues,” featured presenter and invited guest, Congress of European Open Air Museums, Stockholm, Sweden, September, 1991.

“Changes in Interpretive Methods over the Past Twenty Years,” keynote address, Regional Interpreter’s Conference, Farmers’ Museum, Cooperstown, NY, March, 1990.

“Professional Training, Needs, Issues, and Opportunities for the Future,” keynote address, Trainers Workshop, Canadian Museums Association, Montreal, Quebec, March, 1990.

“Overview of Issues and Trends Affecting Professional Training and Human Resources in History Museums,” introductory address, Conference on Professional Training: Needs, Issues and Opportunities for the Future, Cooperstown, NY, November, 1989.

“Changes in Interpretive Methods Over the Past Twenty Years,” keynote address, Minnesota Historical Society’s First Conference for Interpretive Staff, St. Paul, MN, April, 1989.

“Taking Aim at Historical Interpretation: An Agenda for All Historical Agencies,” keynote address, Annual Meeting, Federation of Historical Services, Saratoga Springs, NY, October, 1988.

“American Open Air Museums: Types, Work Methods and Tourism,” featured presentation and special guest, Biannual Congress of the European Open Air Museums Association, Meiningen, Switzerland, September, 1988.

“Interpretation, the Spark of Museums,” keynote, Annual Interpreters’ Conference, Bethlehem, PA, November, 1986.

“Interpretation Techniques for Living History Sites,” seminar director and featured workshop leader; regional seminar co-sponsored by the Ontario Museums Association and the Canadian region, ALHFAM, Toronto Ontario, Canada, April, 1985.

“A New Look at Interpretive Training,” featured presenter, in-depth clinic, AASLH Annual Meeting, Louisville, KY, September, 1984.

“Growth, Development and New Directions for American Open-Air Museums,” featured presenter and invited guest, Biannual Congress of the European Open-Air Museum Association, Hagen, West Germany, September, 1984.

Overview Address, “The Importance of Interpretive Exchanges,” First Midwest Regional Interpreters’ Seminar; (100 staff and volunteers from 22 museums in the region)—concept originator; organizer; program committee, local arrangements chair, session presenter, March, 1983.

“Museum Communication and Cooperation?” keynote, MOMCC Annual Meeting, Charleston, IL, November, 1980.

Presentations, Workshops, and Conference Sessions:

“Integrating Creativity and Innovation into Your Workplace,” session presenter, New Mexico Association of Museums Annual Meeting, Albuquerque, NM, November, 2012.

“People, Place, and What Matters in Your Community,” co-facilitator for issues forum, AASLH Annual Meeting, Salt Lake City, October, 2012.

“Turning Visitors into Advocates by Maintaining Relevance,” co-presenter, ALHFAM Annual Meeting, Farmers Branch, TX, June, 2012.

“Engagement Tools for Building Creative Communities, Placemaking and Partnerships,” session chair and panelist, AAM Annual Meeting, Minneapolis, MN, April, 2012.

“Integrating Creativity and Innovation into Your Workplace,” session presenter, Texas Association of Museums Annual Meeting, San Antonio, TX, March, 2012.

“Making Connections with Visitors Through Creative Interpretation,” session co-presenter, New Mexico Association of Museums Annual Meeting, Farmington, NM, November, 2011.

“Five-Minute Mentoring: Practical Advice for the Museum Workplace,” session chair and panelist (topics: building effective teams; handling conflict in the workplace), Texas Association of Museums Annual Meeting, Irving, TX, August, 2011.

“Charting Your Route: Choosing the Most Beneficial Professional Development Opportunities,” session chair and panelist, Texas Association of Museums Annual Meeting, Irving, TX, August, 2011.

“Rooted in the Community, Transforming Practice to Increase Organizational Vigor,” session co-presenter, ALHFAM Annual Meeting, Worcester, MA, June, 2010.

“From the Heart: Engaging Community and Interpreting What Matters,” one-day workshop, Cape Breton University, June, 2010.

“From the Heart: Engaging Community and Interpreting What Matters,” one-day workshop, Association of South Dakota Museums, Mitchell, SD, October, 2008.

“Does Effective Organizational Leadership Require Loyal Followers?” and “Are Effective Work Teams Loyal? What Research Can Tell Us About Effective Teams,” ALHFAM Annual Meeting, Ottawa, Canada, June, 2008.

“Strategic Interpretation and Program Planning,” presenter, NAI / ALHFAM Southeast Regional Conference, Charleston, February, 2008.

“Giving Community a Meaningful Voice,” session chair and panelist, ALHFAM Annual Meeting, Santa Fe, NM, June, 2007.

“Analysis of Team Management at the Homestead Museum and the Molly Brown House,” panel presentation on applying organizational research on team effectiveness for the panel “Team Management: A Work in Progress,” AASLH Annual Meeting, Phoenix, AZ, September, 2006.

“Community as Partner in Fostering Relevant Interpretation,” panelist, AASLH Annual Meeting, Pittsburgh, PA, September, 2005.

“Organizational Change in History Museums,” session, ALHFAM Annual Meeting, Dearborn, MI, June, 2004.

“A Quarter Century and Counting: Discussion of ALHFAM by Former ALHFAM Presidents,” panelist, ALHFAM Annual Meeting, Houston, TX, May, 1996.

“How Does Major Organizational Change Affect the Museum, Staff and Community?” chair and presenter, Hawaii Museums Association Annual Meeting, Honolulu, HI, May, 1996.

“Mentoring Relationships in the Museum Community: A Growing Necessity,” panelist, AASLH Annual Meeting, Omaha, NE, September, 1994.

“The Changing Role of History Curators,” panelist, AASLH Annual Meeting, Omaha, NE, September, 1994.

“AASLH Task Force on Education and Training,” panelist, roundtable leader, AASLH Annual Meeting, Omaha, NE, September, 1994.

“AASLH Task Force on Education and Training,” speaker, Hawaii Museums Association Meeting, Honolulu, HI, September, 1994.

“Mentoring Relationships in the Museum Community: A Growing Necessity,” panelist, AAM Annual Meeting, Seattle, WA, April, 1994.

“Survival Skills for Curators in the Changing World,” panelist, AAM Annual Meeting, Dallas–Fort Worth, TX, May, 1993.

“Open-Air Museums: An International Network,” session chair, ALHFAM Annual Meeting, Winston-Salem, NC, June, 1992.

“Collaborations in Training and Publications,” panelist, AASLH Annual Meeting, Dearborn, MI, August, 1991.

“Caring for a Museum’s Voice:What Do Interpreters Need?” panelist, AASLH Annual Meeting, Dearborn, MI, August, 1991.

“The Exhibition Reader:Analyzing the Exhibition Process,” panelist, AASLH Annual Meeting, Dearborn, MI, August, 1991.

“Evaluating Multicultural Programs,” session presenter, ALHFAM Annual Meeting, Edmonton, Alberta, June, 1991.

“Are We Ready to Review Critically Public Programming in Our Institutions,” session chair and panelist, AASLH Annual Meeting, Washington, DC, September, 1990.

“Mentors, Workshops and Courses: Preparing for the Next Century,” session chair and panelist, AASLH Annual Meeting, Washington, DC, September, 1990.

“The Cooperstown Conference on Professional Training:A Report,” presenter, ICOM Committee for Training of Personnel (ICTOP) Meeting, Washington, DC, August, 1990.

“Program Review as a Planning Tool for Historic Sites and Outdoor Museums,” panelist, ALHFAM Annual Meeting, Providence, RI, June, 1990.

“Training the Professional Staff of 2010,” session presenter, ALHFAM Annual Meeting, Providence, RI, June, 1990.

“How Can You Tell When You’ve Done a Good Job,” session chair, panelist, AASLH Annual Meeting, Seattle, WA, September, 1989.

“Closing Remarks,” Museums and Social Responsibility Conference, cosponsored by the Cooperstown Graduate Association and National Museum of American History, Washington, DC, November, 1988.

“A Common Agenda: Training History Museum Professionals,” open forum session leader, AASLH Annual Meeting, Rochester, NY, September, 1988.

“The 1987 Museum Studies Program Graduates Survey:An Analytical Report,” panelist, AAM Annual Meeting, Pittsburgh, PA, June, 1988.

“Active Interpretation: Community and Museum Interaction through Living History and Community Festivals”, panelist, AAM Annual Meeting, Pittsburgh, PA, June, 1988.

“Who’s Teaching History? Museums and the Public: New Opportunities, New Responsibilities,” panelist for conference co-sponsored by Cooperstown Graduate Association and Museum of Our National Heritage, Lexington, MA, November, 1986.

“Museum Studies Programs:Where to Go for What,” panelist, MAAM Annual Meeting, Scranton, PA, October, 1986.

“Museum Studies Programs: Current Status and New Directions,” panelist, AASLH Annual Meeting, Oakland, CA, September, 1986.

“Museum Studies Programs and the Humanities,” panelist, AAM Annual Meeting, New York, NY, June, 1986.
“Context for Interpretive Planning,” and “Interpreters and Interpretive Skills,” seminar sessions, AASLH Seminar on Interpretation, Oakland, CA, September, 1985.

“Museum Studies Programs: Present and Future Resource Opportunities,” panelist, AAM Annual Meeting, Detroit, MI, June, 1985.

“Scarlet O’Hara Meets the Marlborough Man: Inaccuracies & Inconsistencies in Regional Interpretations,” panelist, AAM Annual Meeting, Detroit, MI, June, 1985.

“Historic Site Interpretation,” seminar session, AASLH Interpretation Seminar, Colorado Springs, CO, November, 1984.

“So What’s the Point? Research for Interpretation: Translating Research into Written Materials,” presenter, ALHFAM Annual Meeting, Denver, CO, June, 1984.

Midwest Regional Interpreters Seminar (150 interpretive staff & volunteers from 40+ museums in 7 states), local arrangements chair and session presenter, April, 1984.

“Interpretive Planning: Henry Ford Museum/Greenfield Village, A Case Study,” presenter, MOMCC Annual Meeting, St. Paul, MN, November, 1981.

“Historic Site Interpretation: New Directions,” presenter, AASLH Annual Meeting, Williamsburg, VA, September, 1981.

“Interpreting the Lie of the Land, an Uphill Effort,” one of six presenters at an NEH supported colloquium, Historians, Artifacts, & Learners, Williamsburg, VA, September, 1981.

“Professional Standards for Open-Air Museum Interpretation,” presenter, AAM Annual Meeting, Boston, MA, June, 1981.

“Would You Buy Your History from an Open-Air Museum?” presenter, AAM Annual Meeting, Boston, MA, June, 1980.

“How to Organize an Interpreter Training Program, Creative Professional Standards,” presenter, and coordinated three sessions about open-air museums, Midwest Museums Conference, Des Moines, IA, September, 1979.

“Trends in Open-Air Museums” and “Museums and the Handicapped,” presenter, ALHFAM Annual Meeting, Santa Fe, NM, June, 1979.

“European Open-Air Museums: Development and Comparative Trends to America,” slide lecture for interpretive staffs and graduate students at: Henry Ford Museum; Connor Prairie Pioneer Settlement; Clayville Rural Life Museum, Old World Wisconsin, Living History Farms; Cooperstown Graduate Program, and Eastern Illinois University, 1978-1985.

“New Modes in Interpretation,” presenter, ALHFAM Annual Meeting, Tifton, GA, June, 1977.

SUMMARIES OF SELECTED PROJECTS FOR MATELIC, CTM PROFESSIONAL SERVICES

The following brief descriptions of selected projects demonstrate the breath and scope of work that Matelic and CTM Professional Services has successfully completed during recent years.

Los Alamos Historical Society, Los Alamos, NM, 2010–present.

Matelic serves on the Museum's interpretation committee, facilitating the development of a strategic interpretation and programs plan that will guide a comprehensive redo of interpretive exhibits throughout the museum campus in 2015–16. This current work incorporates the initial planning she led for the wartime home of J. Robert Oppenheimer. The initial process began with large-scale community engagement in February 2012, with a 1940s themed community tea, which produced a multitude of ideas and built strong buy-in and support from the Los Alamos community. In 2010 Matelic worked with LAHS on their strategic planning, facilitating a retreat with board members and community representatives, and providing input into the development of new mission and vision statements. She also participated in a symposium for the planning of the Oppenheimer House. This participation included advance input, facilitation of a few symposium sessions, and participation in the preparation of a symposium report.

Client Reference: Heather McClenahan, Executive Director, Los Alamos Historical Society, 1050 Bathtub Row, Los Alamos, NM 87544, 505.662.6272, heather@losalamoshistory.org.

New Mexico Department of Cultural Affairs, Santa Fe, NM, May 2012–June 2013. Hired by Cabinet Secretary Veronica Gonzales to teach 3 day-long workshops on community engagement for staff from state museums (Albuquerque, Las Cruces, Santa Fe, June 2012). Planned and facilitated a series of community meetings around the state focused on articulating community assets and developing a stronger voice for arts and culture in the state (7 meetings held in Fall 2012, 3 meetings held in Spring 2013: Alamogordo, Roswell, Las Cruces, Silver City, Gallup, Grants, Albuquerque, Santa Fe, Taos, Farmington). Summary report of findings completed in June 2013.

Client Reference: Cabinet Secretary Veronica Gonzales, New Mexico Department of Cultural Affairs, 505.827.8425, or Anne Green-Romig, Director of Legislative Affairs, Santa Fe, NM, 505.827.8440.

Amherst Historical Society, Amherst, MA, 2009–2011

Matelic worked with AHS to begin a strategic and long range planning process in 2009. This project began with a session for the AHS board to help them understand the changing paradigms in the museum field and the ways they might transform their operations in response. Once everyone was in agreement, we planned (and I facilitated) a series of gatherings to envision a new future with community members who represented families and a variety of community organizations. At the first gathering participants articulated what Amherst cared about, after discussing the distinctiveness of place, people, and the community's history. Then they explored approaches for AHS to collaborate with other community groups to strengthen its public service, become an organization that matters in the community, and focus on long-term effectiveness and sustainability. The strategy that emerged from the community engagement process included building and diversifying the board, working with community partners for all future programs, using the entire community for events and activities, and conceptually developing the historic house as a headquarters and community center rather than a traditional historic house museum. The AHS board has since formed a long range planning committee that is exploring options for transforming the headquarters facility in collaboration with the neighboring library and other community organizations.

Client Reference: Elizabeth Sharpe, Former Board President, Amherst Historical Society, 24 Summerfield Rd., Amherst, MA, 01002, 413.256.4716, Elizabeth.Sharpe@comcast.net.

South Dakota State Agricultural Heritage Museum, Brookings, SD, 2008–2011.

In 2008-2009 Matelic led a team to complete the first step in a strategic and long-range plan for SDAHM, located on the campus of South Dakota State University. The project focused on community engagement, articulating a new vision for the museum, and gathering ideas about the organization's future, including a new facility and its role in the SDSU community, with agricultural researchers and innovative thinkers, agricultural commodity groups, and traditional museum audiences. Project results included: articulation of an innovative vision, a clarification of the museum's primary and secondary communities, and the innovative proposal to use the entire campus as a museum, with indoor/outdoor exhibits and activities in numerous departments and colleges. The project also resulted in the proposal of a new university-wide interdisciplinary curriculum focused on Agriculture in American Life, with strong support from faculty, students, and agricultural researchers, and utilizing the university community working with museum staff to develop new campus exhibits, practicum courses, the new museum facility, and a program of research with innovative researchers in the field. The final phase of this planning work included recommendations for statewide community engagement, building and expanding the museum's board, refining the vision and planning for a new learning center, establishing alliances and partnerships with other SDSU departments, and developing the materials for a fundraising campaign.

Client Reference: Mac Harris, Former Executive Director, South Dakota State Agricultural Heritage Museum, 925 Eleventh Street, Brookings, SD 57007, 605.697.6043, mrh4ok@hotmail.com.

Historic Germantown Preserved, Germantown, PA, 2007–2008

Matelic served as the lead consultant for a year-long planning process to assist the 13 (now 16) historic sites that comprise HGP to engage their community, develop a shared interpretive framework (with the input of a team of scholars), develop a marketing strategy and marketing/branding plan (working with a team of marketing consultants), and propose a set of steps to build HGP's organizational capacity. The project team also included a community consultant, a project coordinator, and stakeholders from the HGP sites (staff and board representatives). The project included a series of initial community conversations that shaped a large community workshop that was focused on Germantown's distinctiveness as a place, what is special about its people, enduring community needs and issues, and how the HGP sites could work with other community organizations to strengthen historical awareness and community appreciation, and contribute to Germantown's revitalization. After listening to community (the workshop produced a 30-page report) and working with the team of scholars, we articulated a set of four key interpretive concepts to connect Germantown's rich history with the needs and interests of its current population (or what people care about today). This interpretive information and community recommendations were presented to internal stakeholders to create buy-in and support, and to the marketing team to guide their work. The final component was a set of recommendations about HGP's organizational development.

Client Reference: Anne Burnett, Former Program Director, Historic Germantown Preserved. Anne can be reached at 215.872.0622, anneburnett1@verizon.net.

The Homestead Museum, City of Industry, CA, 2007

Matelic worked with the Homestead Museum on an organizational development project focused on strengthening their team management. After a few years of experience with utilizing team management for all operations, the museum management determined that they needed to learn (as a institution-wide team) much more about effective teams and how to improve their existing team management policies and practices. This project began with an organizational analysis (including a survey of all staff and key volunteers). Then, Matelic developed and led a two-day immersive workshop on team management that summarized the empirical research on effective teams and applied theories and techniques to the situation and issues faced

by the museum. Following the workshop, Matelic prepared a summary document to serve as an introduction to team management for new staff and volunteers (this was meant to accompany a “position paper” that the Homestead Museum prepared to document its team management journey).

Client Reference: Karen Graham Wade, Executive Director, The Homestead Museum, 15415 East Don Julian Road, City of Industry, CA 91745, 626.968.8492, k.wade@homesteadmuseum.org.

Naper Settlement, Naperville, IL, 2005–2006

Matelic led a two-person team to develop a strategic interpretation and program plan over a 15-month time period. Components included training for internal stakeholders, a half-day planning workshop with a large group of community leaders, presentations to board members, staff, and community as the project progressed. The final plan included a set of guiding principles, profiles of the organization and the community, the articulation of a compelling interpretive content framework (interpretive significance, key interpretive concepts, content summary of Naperville’s six historical eras, and support for the key concepts from both community and history). The plan also included a programmatic vision for the organization, a set of programmatic strategic directions, a primary visitor message, a set of new target audiences, a discussion of marketing opportunities, and a set of interpretation and program recommendations that were tied to the strategic directions. Since this planning process occurred concurrently with a site master planning process, it was necessary to present the key components of the plan and its strategic implications to the master planning team and offer a series of recommendations to shape the direction of their work (so that it remained visitor-centered). This project led to Matelic’s development of a planning tool entitled *Cardinal Rules for Successful Visitor Centered Site Development*. The project produced a 150-page document.

Client Reference: Donna Sack, former Director of Visitor Services, Naper Settlement, 325 South Webster St., Naperville, IL 60540. Donna can be reached at 630.577.7540.

The Fabric of Philadelphia, The Design Center, Philadelphia University, 2006

Matelic led the interpretive planning portion of a feasibility study to explore the potential of interpreting Philadelphia’s rich textile history with many organizations, neighborhoods, and individuals. This project involved many partners and participants, and a very complex conceptual planning process. Matelic designed and led a two-part community engagement process. The first part sought ideas and input from a broad-based (but carefully selected) group of 40 community members representing different textile neighborhoods and audience categories, for example, families, or seniors. Their input was organized and presented for Part B to a similar sized group of professionals from a variety of cultural organizations throughout the Philadelphia metropolitan area. The professionals were asked to help to articulate a series of possible programmatic scenarios, using the information from the Part A gathering. This process produced a rich array of creative program ideas with possibilities for many approaches, venues, contacts, community resources, and organizational partners. Matelic wrote a summary assessment of the process, highlights of the results, and recommendations for next steps. This project is a good example of the value of engaging community as well as colleagues as part of a planning process. The project produced a number of reports, very large notebooks filled with resources relevant to the Fabric of Philadelphia, and a large database of potential contacts, partners, and funders.

Client Reference: Carla Bednar, former Assistant Director, The Design Center, Philadelphia University, Philadelphia, PA, carla_bednar@msn.com.

The Mill at Anselma Preservation and Educational Trust, Chester Springs, PA, 2003–2005

Matelic served as the lead consultant for a three-year planning process. It began with an assessment of the existing master plan and site, and training for board members and key stakeholders. An initial community

workshop resulted in the formation of a Mill Community Working Group that participated in subsequent planning. Then Matelic led a yearlong interpretation and program planning process that included scholars, community members, Mill stakeholders (board, staff, and key volunteers), and museum colleagues to serve as “audience advocates.” We developed an interpretive content framework (interpretive significance, key interpretive concepts and their supporting theme statements), and used it to guide program and site development. The final plan (187 pages) included guiding principles, community profile, content framework, and strategy for programs and public service (programmatic vision, strategic directions, primary visitor message, target audiences, marketing opportunities, and sustained community engagement). The interpretive plan section included an organizing rationale, and recommendations for visitor hospitality and amenities, interpretive methods, innovative programs and special events, sustainable partnerships and products, timeframe and implementation strategy. Year three focused on testing initial interpretive concepts with selected target audiences, exploring a digital media “virtual mill” orientation, developing “teaching tools” to help to explain the technology to visitors, and developing an initial mill product line and partnerships. Following the testing, refinements to the interpretive plan were written. This planning process transformed the Mill from a preservation organization to a vibrant new public site with a growing foundation of dedicated volunteers and community supporters.

Client Reference: Heather Reiffer, former Executive Director, The Mill at Anselma Preservation and Educational Trust, 1730 Conestoga Rd., PO Box 42, Chester Springs, PA 19425, 610.918.1603, hpreiffer@gmail.com.

Mother Bethel Foundation, Center City, Philadelphia, 2004–2005

Matelic facilitated a very large community gathering (60+ people) and was then recruited to serve as project director for a yearlong IMLS supported planning process to help the Mother Bethel Foundation secure the necessary financial support for a center to honor Richard Allen. The project had a team of museum colleagues as advisors, along with a team of scholars, many stakeholders, neighbors, and other community leaders. Components of the planning process emerged as the project went along. During the initial retreat participants were organized into teams representing content and community (audience) advocacy, and articulated ideas for key interpretive topics, important story lines, and core values, community definition, trends and patterns, community resources and constraints, and enduring issues. Using this information, participants explored big unifying concepts and program formats, ways in which the framework and program ideas could address community interests and needs, target audiences, and the components of successful visitor experiences to the site. The overarching concept for the Richard and Sarah Allen Center for Faith Freedom and Community and the big idea of “the inspiration of faith, the challenges of freedom, and the strength of community” emerged from this process. These ideas were strengthened by subsequent work with scholars and museum team members, as they offered reflections on the underlying scholarship and the potential stories to convey the big idea to visitors. A final gathering of program and marketing experts and a public forum with neighbors and community members helped to shape the overall program strategy, interpretive plan, and recommendations for site development. Matelic compiled the proceedings of the planning process into a two-inch binder and wrote the 60-page Strategic Interpretation and Program plan with profiles of the organization and community, a content framework, a strategy for programs and public service, a plan for interpretation, public use and programs, and a discussion of the strategic implications of the plan.

Client Reference: Delores Brisbon, former President, Mother Bethel Foundation, 241 South Sixth Street, Apt. 2201, Philadelphia, PA 19106, 215.238.1336, dbrisb2@verizon.net.