

Burwell Strong: How a Small Historic Site Rebuilt After Catastrophic Theft by an Employee

Presented by:

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Introduction

Presented By: Brooks

(Slide 1: Title)

First of all, thank you for joining us today. We are honored to be part of this conference and hope that attendees will be able to learn from our experience. Before we get started we'd like to first explain a bit about who we are and what we do.

Part One: What is The Burwell School Historic Site

Presented By: Carrie

(Slide 2: What is the Burwell School?)

The Historic Hillsborough Commission owns and operates The Burwell School Historic Site. Established by the NC General Assembly in 1963, the Commission acquired the Burwell School property in 1965 and began renovating it.

(Slide 3: The Burwells)

The Burwell School Historic Site has been welcoming visitors into the house since 1977, exploring the years 1837-1857 when Robert and Anna Burwell operated a school for young ladies on the property.

(Slide 4: Elizabeth Keckly)

As the commission and the site have evolved, the interpretive focus has expanded to include not just the Burwell family and the students, but also the people of color who lived and worked at the site, including our most famous resident, Elizabeth Hobbs Keckly who was enslaved by the Burwells but years later purchased her freedom, became the dressmaker for Mary Lincoln, and published a memoir entitled: Behind the Scenes, or 30 years a slave and 4 years in the White House. Our operating budget is approximately \$80,000 year and we receive funding from town and county sources, grants and donations.

Part Two: 2018 Setting the Stage

Presented by: Brooks

(Slide 5: Setting the Stage)

To all appearances, 2018 was a banner year for the Burwell School Historic Site. We devoted the year to the bicentennial observance of the birth of Elizabeth Hobbs Keckly. We held programs with nationally-recognized scholars of African American history and literature.

(Slide 6: Keckly Exhibit)

We built our permanent exhibit and expanded our interpretation to reflect the prominent incorporation of her remarkable story into the site. Indeed, we could say with justification that the Burwell School has become the nation's foremost historic site for the interpretation of Elizabeth Hobbs Keckly.

(Slide 7: Task Force)

Following on that success, we launched a task force to document all of the enslaved persons and free persons of color who worked at the site during the years the Burwells operated their school.

I underscore all of this because it was achieved at an internal cost. Our quarter-time Executive Director and her half-time Site Manager were working long hours and this was taking a personal toll. Simply put, the Burwell School Historic Site did not have the human and financial resources at hand to take on such an ambitious program and sustain site operations. Shortly after the conclusion of the Keckly Year in November 2018, the Executive Director announced that she would resign effective the end of the calendar year.

This set off a scramble within the organization to figure out how to staff the site for the coming year: The Site Manager was promoted to Director and her hours were increased to full-time. Because the Site Manager had no expertise in the area of historic interpretation, Carrie Currie was asked to assume the newly-created position of Historical Coordinator.

Concurrently, the Board convened a strategic planning task force to look at how best to organize and support the mission of the Site.

Part three: Spring, 2019 Cracks begin to show.

Presented by: Carrie

(Slide 8: Cracks begin to Show)

I transitioned from an undefined role of docent/researcher at the Burwell School in January 2019 when the historical coordinator position was created. This was a time of much transition for the site, with an outgoing director and staff that were adjusting to new positions and responsibilities. There was a sense of renewal at this point, but sadly that would only last for a few months.

Unlike prior years, the first and most of the second quarter of 2019 were spent in a flurry of events with a big emphasis on fundraising. In my position, I was much more focused on developing the historic interpretation, but I was aware of deficits in our administrative structure and felt overwhelmed by all of the time-consuming events. Each year, the major fundraiser for the Burwell School is a spring gala and auction. Traditionally this event is very stressful and time consuming, but in 2019, with our lack of organization it was especially intense. The event was not a huge success, and it was at this point that I felt I had to speak up. I was too invested in the place and its history to not make the commissioners aware of some major problems with the administration of the site.

(Slide 9: Letter to Commission)

At that point I wrote a six page letter to the chair, advising him of some of the problems including payroll inconsistencies, lack of communication and an overall toxic workspace. I requested that there be published job descriptions and policies in place for basic human resources. I knew that there were frustrations from the commissioners as well, that they were looking for information that was just not forthcoming regarding site finances. Not long after I wrote my letter, I was made aware that there was no longer funding for my position. While the commission was trying

to get access to the financial information, they were being told that the money wasn't there to keep me on in my half-time position. My position was scheduled to terminate on June 30, 2019.

Part Four: Spring 2019 The Commission Becomes More Aware Presented by Brooks

(Slide 10: Part Four)

As chair of the strategic planning task force, I began a review of operations over the past 10 years. Two things stood out in sharp relief. 1. Some issues were long-standing and had been repeatedly identified but never fully addressed: fund development, site development, and staffing. 2. In some areas, such as financial management, we had actually lost capacity: restricted and unrestricted funds which had been clearly segregated at one time were now commingled, and funds set aside to create an endowment were no longer properly labeled and managed. As Carrie has noted, the strategic planning committee repeatedly requested current financial information from the director which was not forthcoming.

(Slide 11: Commissioner Survey)

In the meantime, the strategic planning committee conducted a survey of current commissioners. The results were stark: Commissioners overwhelmingly identified the site and its interpretation as assets, along with the work of the research committee, and volunteer support. They identified as challenges the limitations of the site; lack of a fundraising strategy, inadequate financial and administrative functioning, and lack of coordination among committees.

Part Five: Summer 2019 Discovery & Documentation Presented by Brooks

(Slide 12: Part Five)

By early June, site operations had reached a crisis point. The finance committee met in late May, but lacked the necessary information to present a budget for the upcoming fiscal year. The strategic planning committee learned of bounced checks, payroll delays, and other financial irregularities. The Commission voted to seek an outside bookkeeper to hand financial management and appointed a small group to work with the Director on effecting the operational change by the end of the month.

The first step was for the Commission Chair to access the current bank accounts. Upon receiving that access, he immediately realized that money was missing from the account. A cursory grant at the bank statements for the past 6 months confirmed this grim discovery. A meeting with the Director was quickly scheduled, but she declined to attend. By the end of the day, she had been formally dismissed and the preliminary evidence of theft and forgery had been turned over to the Hillsborough Police Department.

Over the course of the summer, an accounting firm was engaged to help us with the complete documentation of our loss. The summary findings, which amounted to \$174,000 taken over 3 years, were presented to the police, who charged the Director with a Class C felony. The criminal prosecution is ongoing.

Part Six: July-December 2019 Moving Forward
Presented by Carrie/Brooks

(Slide 13: Part Six)

Carrie: When the theft was first discovered, I was called to come to the site and let them know what was missing. My fear was that we would somehow have lost access to years of research, or that artifacts may have been removed. At this point, we were undertaking an inventory process, but it was not well-defined and we didn't really have the tools we needed to properly document and discover what might be missing and whether it was related to the theft. It was obvious that we needed to make some changes.

(Slide 14: Self-Guided Tour)

Brooks: Without a Director, the Commission needed a plan for maintaining site operations. We determined to keep the site open by utilizing volunteers as greeters, and we quickly developed a self-guided tour—offering laminated cards to interpret each room. Our former Executive Director, our Treasurer, and key volunteers worked tirelessly without compensation to restore communications and reconstruct financial operations. We instituted basic financial controls to insure proper handling of income and expenses. And we held a fundraiser which netted over \$10,000.00. Except for paying our weekend docents and a small honorarium to Carrie to continue some of her essential work for the research committee, we operated the Site for the last 6 months of the calendar year without any paid staff.

In dealing with the public, with our contract partners, and with our donor base, we tried to be as candid and transparent as possible. Remarkably, everyone stood by us, and we were able to conclude the year in a favorable financial position.

(Slide 15: Becoming Burwell Strong)

I don't wish to relive that 6-month episode, but I would be remiss if I didn't say that it strengthened the organization in significant respects.

- A. It forced the board to become much more active and to utilize volunteer resources more effectively. By pulling together to keep the site operational, the esprit de corps was lifted and we adopted the motto "Burwell Strong."
- B. It facilitated implementation of strategic plan recommendations re: calendar management, staffing, and fundraising. We created detailed job descriptions and better financial reporting.

Part 7: 2020--Entering a New Era

Presented by Carrie:

(Slide 16: Entering a New Era)

As Brooks mentioned, while I didn't have an official position, I did stay involved with the site. I believe in the mission of the Historic Hillsborough Commission, and it was such a joy to see the support of the community, the commission and dedicated volunteers who were determined to see the site recover and rebuild.

Brooks has a very inclusive goal when it comes to leadership. He is able to recognize the strengths of his support base and build off of that. Together at the end of 2019 we were able to

develop some of the things I had personally requested, like job descriptions. In early 2020 I was officially rehired as the historical coordinator and a wonderful new site manager was hired to manage the administrative side of our operations.

Much like January of 2019, January 2020 was a time marked with a sense of renewal. The commissioners stepped up even more than before. They were taking ownership of the site in ways I hadn't yet seen. We entered into a Management Services Agreement with The Alliance for Historic Hillsborough which turned over previously defunct human resources tasks like background checks and payroll to an institution prepared to manage those needs. We were finally starting to establish necessary policies and protocols and the commission approved a new Collections Management System so we could accurately inventory our collection and preserve the artifacts that bring people to our doors. It was exciting and bustling...and then in March the world closed because of COVID.

(Slide 17: Burwell Strong)

Had we not had the overhaul, I don't know where Burwell would be here and now in 2020. Because we had systems in place, well defined roles and a motivated commission we have been able to weather the storm. Our fundraising efforts have continued successfully – keep in mind we do not get any state funds – and the faith in the mission and administration of the site is at an all time high. People know what to expect from The Burwell School Historic Site – they know when they visit they will get a glimpse at the history of a place that has been documented, preserved and presented for the education of the public by dedicated commissioners, staff and volunteers. It is a place I am very proud to work, and I personally see what we have overcome as a badge of honor. We remain Burwell Strong!

Conclusion:

Presented by: Brooks

"Behind the Scenes" is more than title of Keckly memoir; it describes much of the institutional/foundational repair work of the past 2 years. Burwell indeed strong--and getting stronger.

(Slide 18: Questions)