

## **OI-SHEAR PARTNERSHIP PROPOSAL**

The OI is convening a Virginia Consortium for Early American History, drawing together key research centers that are critical not only to knowledge production in Virginia but to our fields. We are honored and excited to invite SHEAR to join the Consortium as a founding member and to build a new administrative home at the OI. We believe that SHEAR – an organization that has facilitated field-defining, path-breaking work about the early U.S. republic for two generations – has the capacity to serve as a crucial partner in the Virginia Consortium. And we are equally confident that a successful institutional collaboration between the OI and SHEAR will create new opportunities for scholarly production and institutional visibility and growth.

Together, we have a once-in-a-generation opportunity to shift the center of gravity in our fields in ways that will support scholarship; cultivate new constituencies; and sustain our organizations and the constituencies we serve in a time of profound professional uncertainty. Our confidence in the potential of this partnership is reflected in our commitment to support for SHEAR via reduced administrative costs (\$18,000 annually) and a five-year commitment of \$10,000 in direct support.

**The Virginia Consortium** will create sustained relationships among the state’s prestigious roster of research centers, libraries, and institutes that are deeply (if not solely) concerned with the American past. Considered together, these institutions rival the resources in Philadelphia or the Boston-Cambridge corridor. The Virginia Consortium will serve two, connected purposes:

First, by uniting institutions from Charlottesville to Alexandria and the Chesapeake Bay, the Consortium will serve as a megaphone for amplifying the importance of Early American history, alerting the public to the new research and lively conversations that animate our fields and underscoring the crucial role that the Commonwealth’s archives, libraries, and research centers have played and continue to play in shaping our understanding of that past. By highlighting our shared commitment to research about the Early American past, the consortium will establish pathways for institutional communication and partnership even as we leverage our resources to grow audiences and increase engagement.

Second, under the OI’s leadership, the consortium will convene a working group to address the challenges of producing and disseminating research about Early America, challenges that are especially acute for emerging and junior scholars. The working group will be tasked with considering issues of access, acquisition, project development, and form/genre. The working group’s initial goal will be to generate proposals to mitigate problems in these areas and to identify—and seize—new opportunities; the ultimate outcome will be pilot programs to test our proposals. Although the consortium proper is focused on Early American history, these challenges are not special to it, and our hope is that the working group will generate insights and models that are more broadly applicable.

The Consortium is still in its formative stages. We expect to finalize membership by July and begin planning meetings via zoom by September. We have tentatively targeted the October “For 2026: Contested Freedoms” conference for the Consortium’s formal launch. At present,

confirmed partners include the Fred W. Smith National Library for the Study of George Washington at Mount Vernon, the Virginia Museum of History and Culture, the Carter G. Woodson Institute at the University of Virginia, and William & Mary's Swem Library. Calls and meetings are in process with the Library of Virginia, the International Center for Jefferson Studies, and the Rockefeller Library at Colonial Williamsburg. It is no exaggeration to say that the initial response among committed and potential partners has been unfailingly enthusiastic.

**The OI** is an independent research institute housed at William & Mary. We are generously supported by W&M, our founding partner, Colonial Williamsburg, and our Associates, who are roughly equivalent to Friends of SHEAR and SHEAR's members. You can read more about us [here](#) and [here](#).

We like to say that “we build intellectual infrastructure.” Building that infrastructure, to say nothing of maintaining it, demands a whole-hearted commitment to partnership, to access, and to sustainability. Our current partners include organizations as diverse as Fort Ticonderoga, the Folger Library, the Huntington Library, Slave Voyages, and Enslaved.org. In the past five years, we have increasingly leveraged our position to help sustain scholars at a time of wrenching professional instability and economic precarity. Our [NEH-ARP grant](#) delivered direct financial support to some 20 scholars who were disadvantaged by the pandemic. We now regularly solicit applications to support conference attendance for emerging and un- or underfunded scholars. (Our new website, which will go live within the month, will include an application link.) Although most of the grants are capped at \$2500, we have chosen to give considerably more to initiatives that align with our commitment to D/E/I. Upcoming examples include support for ASWAD's biennial meeting in Accra this summer and the “Disability in Vast Early America Conference scheduled for the coming fall. And at our “For 2026: Revolutionary Legacies” conference last fall, we covered the lodging expenses for every emerging/unfunded scholar who requested assistance.

The same logic drives inhouse priorities. We have worked hard to increase access at all levels within the OI, from authors and peer reviewers to members of our Council and Board. Earlier this month, our outgoing Council Chair, Jennifer Morgan, was succeeded by Michael Witgen – the first Indigenous scholar to serve in that capacity. And this year, we will launch an annual \$5000 paid internship for an advanced undergraduate or a Masters student at the *WMQ* with the goal of supporting professional development for individuals who are underrepresented in the academy and scholarly publishing.

We're proud of all of these initiatives. We see them as the beginning of a commitment that will sustain the OI, and the multiple constituencies we serve, into the next generation.

**The OI-SHEAR Partnership** builds on our commitment to partnership and building infrastructure. Bringing the OI and SHEAR together will serve to anchor SHEAR's administrative home in the Commonwealth and thus ensure its participation in the Consortium. Reconfiguring the field to bring the two most important producers of knowledge about America before the Civil War into conversation, the OI-SHEAR partnership positions each organization to ask, “What can we build if we work together? How can we leverage similarities and differences to create a more sustainable future?”

The OI-SHEAR partnership will also shift publication of the *Journal of the Early Republic* from Penn Press to UNC Press. Our publishing partners at UNCP are exceptionally well situated to deliver top-flight service, to think creatively about business and marketing strategies, and to leverage the partnership's marketing potential. Widely recognized as [innovative problem solvers](#) in the attempt to create more sustainable forms of scholarly publishing, they will be excellent thought partners and practitioners as the working group on scholarly publishing gears up.

**The benefits of a Consortium membership and an OI partnership for SHEAR are spelled out in detail in the pages that follow. Where we can identify the precise cost of particular initiatives, we have included those figures as one more means of signaling our enthusiastic investment in a partnership with SHEAR.**

Before specifying what the Virginia Consortium and an OI partnership means for SHEAR, it makes sense to specify what it *does not* mean: Membership in the Virginia Consortium, including an administrative partnership with the OI, does not preclude SHEAR from generating partnerships with other organizations. On the contrary. In the current economic and political climate, it behooves us all to maximize institutional as well as individual relationships. From our perspective, SHEAR can and should partner with organizations in Philadelphia and beyond. Put baldly: SHEAR's membership in the Virginia Consortium no more precludes its ability to collaborate with other institutions, organizations, or journals than it precludes our ability to continue working with valued partners across the country and internationally.

Moreover, the OI-SHEAR partnership will feature neither OI involvement in SHEAR's governance nor OI interference in SHEAR officers' editorial oversight of the *JER* and *JER Pano*. The OI is not looking for a subsidiary; it is looking for a partner. We seek to invest in SHEAR's independence and help its members and officers continue to improve its multifaceted programs. We do so out of a bone-deep confidence that such a course of action enhances the OI's independence and helps secure the future of its scholarly programs. This partnership, we believe, represents a very promising path forward for both SHEAR and the OI – and for the field that they serve.

## Benefits of the OI-SHEAR Partnership

### Administrative Service Package:

- MOU outlining SHEAR's administrative relationship with the OI that:
  - Stipulates the autonomy of both the OI and SHEAR by delineating the OI's obligation to provide administrative support to SHEAR and by clarifying the boundaries that separate the operations of a membership-based scholarly society and an independent research institute.
  - Affirms that the two organizations' publications, programming, and decision-making bodies (SHEAR's Advisory Council, Executive Committee, and standing committees and the editorial staff of the *JER* and *JER Pano*; OI's Board of Directors and Council and editorial staff of *WMQ* and OI Books) remain completely separate.
  - Establishes a regularized, annual review process for each partner to check in on the elements of the partnership that are or are not working. We also propose a cellar-to-attic review of the partnership in 5 years if both organizations agree to do so.
  - Itemizes the rights and responsibilities of both parties.
- OI offers SHEAR an expanded portfolio of administrative services addressing:
  - **Membership:** OI staff will administer membership and Friends of SHEAR; support SHEAR's efforts to maintain and grow membership, e.g., by creating a monthly direct giving program for members who wish to spread their contributions over a 12-month period; mailing and e-distribution for annual appeals, Giving Tuesday letters, annual elections, etc.
  - **JER Subscriptions:** managed by OI staff in consultation and coordination with UNCP representatives.
  - **Data management:** To ensure efficient and transparent management of SHEAR data, billing and receipts, subscriptions, memberships, and fundraising information, the OI will purchase and maintain an account with [Neon One](#) (a nonprofit CRM platform) for SHEAR. Sue DiPette, Data Manager for the OI, will be responsible for handling SHEAR's Neon account (managing initial data upload; maintaining database; generating reports and analytics; fielding queries from SHEAR leaders and members). SHEAR officers and/or their designees will always be able, after some basic training, to access the database. **OI investment: initial data upload: \$4,000; annual maintenance fee thereafter: \$1,188.**
  - **Conference Services:** In addition to handling the registrar's duties without additional cost (currently handled by SHEAR's Executive Coordinator for an annual stipend of \$3000), OI staff (Laurel See and Beverly Smith under the

direction of Martha Howard) would assume responsibility for most of the administrative tasks that now fall to the Conference Coordinator. Conference Coordinator would retain responsibility for securing conference locales and local arrangements chairs; recruiting sponsors and advertisers; representing the conference at Advisory Council meetings and to SHEAR's executive leadership. All routine administrative work would be assumed by OI staff under the direction of Associate Director Martha Howard and with guidance from both the SHEAR Conference Coordinator and SHEAR's leadership.

- **Web support:** The OI will fund site rebuilds for SHEAR, the *JER*, and *JER Pano* by our web designer, [Colour Outside](#). Rebuild will include migrating these sites to a new server; upgrading them to improve function and cohesion; and generally giving them a refreshed appearance per the direction of SHEAR's leadership. Once the new sites are fully operational, the OI staff, under the guidance of Associate Director Martha Howard, will assume responsibility for routine updating and maintenance. Issues that cannot be resolved in-house will be handled by Colour Outside as part of their retainer. *JER*, *JER Pano*, and SHEAR teams have already met with Martha Howard and Scott Hale (Colour Outside's Director of Operation) to discuss needs and options. **OI investment in migration and rebuild: \$25-30,000.**
- **In addition:** OI administrative staff will be available to handle additional administrative work should SHEAR opt to expand member engagement by sponsoring NEH teacher institutes, offering regular virtual programming (lectures, workshops, working groups), etc.
- **Workflow within the OI:** As different as the OI and SHEAR are in some ways, there is considerable overlap in key operations. Both organizations manage journal subscriptions and membership rolls; issue appeals letters; host conferences and similar programming (in person and digital). At the same time, recent changes within the OI (revision of position descriptions; creation of new positions; adoption of Neon) have improved our efficiency and increased our staff's capacity. For those reasons, the OI's staff is now positioned to layer SHEAR's needs onto existing workloads and work processes.

OI staff involved with SHEAR would include:

- **Catherine E. Kelly**, Executive Director and Professor of History, will oversee partnership and liaise with both SHEAR's leadership and UNCP team as needed.
- **Martha Howard**, Associate Director, will ensure coordination among the OI's staff and liaise with SHEAR/*JER*/*JER Pano* and Colour Outside teams as needed. Martha will also take direct lead on work connected to conferences and websites.
- **Laurel See**, Administrative Coordinator, will offer direct support to Martha Howard throughout the year. She will play a visible, hands-on role with the

- conference, taking responsibility for gathering and distributing annual reports, and serving as conference registrar.
- **Sue DiPette**, Data Manager, will handle everything connected to SHEAR's data, including memberships, communications with individual and institutional members, subscriptions, registrations, and donations. She will be the point person on the transmission of subscription information to UNCP and will field questions and trouble shoot as necessary w/r/t Neon.
  - **Beverly Smith**, Administration Manager, will handle day-to-day finances, working closely with SHEAR's accountant and Gene Smith, the SHEAR officer tasked with finances and development. She will also support Laurel and Martha with work connected to the annual meeting and appeals letters.
  - All of these staff members have reviewed the detailed list of responsibilities and time commitments provided by Amy Baxter Bellamy and certified that they can manage SHEAR's needs within their current position descriptions. Although there will be increases to our workload at the outset (managing data transfers; overseeing website rebuild; moving the journal to a new press), we are confident that we can meet SHEAR's administrative needs and that we can do so without hiring a specific individual tasked only with SHEAR. Please see OIEAHC Organizational Chart for further details about staffing.

***JER + JER Pano:***

- **JER publication:** Moves to UNC Press, which publishes related but not competing flagship journals (*Early American Literature, Journal of the Civil War Era*). Distribution handled by Duke University Press. Please see separate UNCP proposal and pro forma budget for details. Financial estimates are on par with those from Penn Press.
- **JER Pano:** Will benefit from an upgraded and stable site; see **Web Support**, above.
- **JER Staff:** Kate Tyler Wall, the *JER*'s invaluable longtime Managing Editor, is compensated by both Penn Press (for copy editing) and by SHEAR, via Historic Society of Pennsylvania, for serving as Managing Editor. HSP also provides Wall with an office.

Should SHEAR join the Virginia Consortium, we would work to ensure that the move was minimally disruptive for Wall. Kate would work 100% remote, with technical support from W&M's IT department; Kate has indicated that this is completely acceptable and poses no threat to the journal's workflow. (The *WMQ*'s own Managing Editor has worked remotely for over a decade.) **This shift to 100% remote work and gratis IT support, from the staff at W&M IT or Colour Outside, represents an annual savings of \$6000 over 2022 expenditures.**

In an ideal world, SHEAR would continue to pay Kate via the HSP, thus preserving the benefits and seniority she has accrued there. If that is not possible, the OI will hire Kate as a W&M employee with salary reimbursed from SHEAR. She would lose seniority but enjoy the excellent benefit plan extended to employees of the Commonwealth of Virginia.

Kate has already met with UNCP staff to learn more about their processes and pay rate for copy editing, currently \$5.25 per page, which is above the going rate for scholarly presses. We have also forwarded her information about PTE benefits at W&M. Cathy Kelly, moreover, spoke to her at length about challenges in her current work situation, concerns about the move, and goals for the future. In sum, although any shift in work arrangements has the potential for temporary disruption, we are confident that the transition can be managed to minimize impact on *JER* operations.

### **Innovative Institutional Collaboration :**

The OI and SHEAR would actively collaborate to expand each organization's reach and promote scholarship about the American past by

- Leveraging the capacity of two flagship journals, the *JER* and the *WMQ*, to benefit each organization and enhance the field writ large.
  - We propose offering *JER* readers a one-year, complimentary subscription to the *WMQ* and vice versa; complimentary subscriptions could be extended to new subscribers past the initial promotion period. Strategies like this promise to extend the reach of each journal and increase reader engagement across the field.
  - Joint issues, forums, etc., organized at the discretion of the journals' editors., can draw attention to path-breaking work and provide fresh perspectives on unsettled debates while driving traffic to both journals.
- Targeting conferences to promote organizations' intellectual and financial interests.
  - SHEAR and OI would jointly sponsor designated panels at their respective annual meetings. These panels might also include participation of other Virginia Consortium members.
  - SHEAR and OI would also sponsor joint panels at AHA and OAH; these panels should be offered in addition to those already committed to individual organizations.
  - Every third year, OI and SHEAR annual conferences will be held jointly at rotating locations in Virginia. These meetings will underscore the importance of our organizations' mutual commitment to Early American history as well as afford opportunities to collaborate with other members of the Virginia

Consortium. Crucially, they will enable SHEAR and the OI to share the costs and mitigate the financial burdens posed by conferences in a post-pandemic environment and ease the burden of securing institutional partners to serve as hosts. We also propose that SHEAR continue to meet in Philadelphia in every third year, in recognition of its history with the city and the MCEAS, and to regularize member participation while easing planning burdens – but that decision rests with SHEAR leadership.

- Moving well beyond paid administrative services, the partnership model proposed here creates opportunities for mutually beneficial collaboration along multiple axes.

### **Benefits of Membership in the Virginia Consortium**

As a founding member of the Virginia Consortium, SHEAR’s active support and engagement would benefit partner organizations throughout the Commonwealth while creating new opportunities for SHEAR, its members, and the field by

- Joining a vibrant, diverse, prestigious community of research centers, libraries, archives, and institutes who are deeply (if not solely) committed to the study of the American past.
- Helping steer Consortium governance and participating in the ongoing business of the consortium via quarterly meetings. Although most meetings will be on Zoom, one in-person meeting per year would be desirable. SHEAR would designate its representative.
- Participating in consortium-sponsored programming in Virginia and the D.C. beltway area aimed at amplifying the work of the consortium and the importance of Early American history.
- Committing *JER* editorial leadership (or designees) to participate in an OI-directed working group on scholarly publishing, which will confront issues of access, acquisition, and project development.
- The Consortium will provide SHEAR with the opportunity to take a leadership role in promoting career paths in public-facing history and tightening linkages between scholars and public-facing institutions, thus benefitting SHEAR’s membership and the field more generally.
  - We propose to jumpstart this process by connecting SHEAR to W&M’s [RevEd](#), an ongoing collaboration between museum educators, teacher educators, and classroom teachers. Together with RevEd Director Mark Hofer, the OI will invite SHEAR members to serve as featured scholar-participants at the annual [RevEd Teacher Summit](#), starting this year, and scheduled in conjunction with the “For 2026: Contested Freedoms” conference (Williamsburg, VA, Oct. 2023). We will also host an annual



meet-and-greet for museum educators, teacher educators, and emerging scholars, including those who are SHEAR members or OI Associates, focused on career building and networking.

- W&M's Swem Library has agreed to contribute **25 digital fellowships per year** to support research among scholars who lack access to crucial databases, including both primary and secondary sources. Although the Consortium will need to decide how the fellowships are awarded, we can guarantee that half of them will be ear-marked for SHEAR members.
- As a founding member of the consortium, and in recognition of SHEAR's importance to the ongoing work of the Virginia Consortium, the OI will guarantee direct financial support (**\$10,000 annually**) to SHEAR for 5 years. Funds would be allocated at SHEAR's discretion but could support course buyouts for *JER* editors, intern support at the *JER Pano*, programming, fundraising efforts, etc. **Please note:** It is possible that the OI's attorney will include language in the MOU about how the funds can be allocated and about how expenditures are documented; the goal here would simply be to ensure transparency.

#### **Building Sustainability Across the Board**

- The invitation to join the Virginia Consortium and partner with the OI is predicated on leveraging existing resources to create efficiencies; capitalizing on areas where interest and expertise intersect; fostering distinct institutional identities the better to encourage and support mutual growth; and helping secure long-term sustainability across our fields.
- SHEAR's founding role in the Virginia Consortium will create opportunities for new and targeted visibility and fundraising.
- Cross-pollinating subscriber lists via complimentary subscriptions per the above will automatically grow the list of potential members and Friends in SHEAR's Neon account, providing an immediate boost to SHEAR's development capacity.
- Joining the Virginia Consortium as a founding member and partnering with the OI to meet SHEAR's administrative needs secures a better bottom line: **The \$18,000 annual fee charged by the OI represents a considerable savings in SHEAR's annual expenses and the \$10,000 annual stipend from the OI affords the opportunity to further savings or enhance operations.**

