

At the Corner of History and Innovation: Using Public History to Influence Public Policy

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Abstract: A dozen-year-old not-for-profit, the Boston History and Innovation Collaborative, emerged in the late 1990s to experiment with making historic themes other than the “cradle of the American Revolution” popular to visitors and residents to the region. It developed heritage tourism tours along four historical themes—maritime, literary, family history/genealogy, and innovation. With the innovation theme and its connection to diversity, the Collaborative over the past six years has taken an unusual trajectory as a public history organization. The article looks at the impact the Collaborative has had on the image of Greater Boston.

Key Words: Maritime history, literary history, genealogy, family history, ethnic history, diversity, African-American history, business history, labor history, economic history, innovation history, Boston, Massachusetts, collaboration, coalition, technology, creative class, public policy, American Revolution, branding.

For over ten years, I have watched the History Collaborative seed the idea that Boston’s real story is its four-century tradition of innovation, and I have seen that story take root in some powerful places—from the *Globe’s* “Innovation City” piece in June 2004, to the Mayor’s story of Innovation for the 2004 DNC, to the Boston Foundation’s book *The Good City* and Boston Magazine’s “Smartest City in the World” issue of last year. Many of the leading lights in

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Greater Boston now talk about the region in terms of its innovation—a remarkable impact given the brief existence of the Collaborative. You have reintroduced the region to its past and shown how the lessons of that innovative history are absolutely integral to its economic future.

—*Dr. Richard Freeland, historian, and president emeritus,
Northeastern University; Commissioner,
Massachusetts Board of Higher Education*

FOR OVER A DECADE THE BOSTON HISTORY AND INNOVATION COLLABORATIVE has moved on a trajectory that represents a very unusual use of public history. It has developed from a collective effort to explore and capitalize on Boston's many histories and historic resources into an organization that focuses on how to use our city-state's history to help the area stay economically and culturally vital over the long term—twenty-five years going out. It is very public, is based in history, and has affected how key political players think about policy, and in some ways, how the region thinks about itself. This is the story of the Collaborative's evolution, a story of how, in a city best known for the Freedom Trail, historians and community leaders brought other parts of Boston's past to the public's attention. The Collaborative has produced a number of projects—"The Literary Trail of Greater Boston," "Boston by Sea: A Seafaring Adventure Through Boston's Past," a "Family and Immigration History Project," an innovative maritime heritage walking tour, historical plays, and, perhaps most uniquely, "The Innovation Odyssey," a public history project that focuses on Boston as a hub of technological, financial, educational, medical, and social innovation. Recently, the nation's economic crisis has hit key Collaborative partnerships, such as the proposed Boston Museum project, hard. Still, the Collaborative carries its history work in new directions, as the resonance of the innovation theme has moved the Collaborative increasingly into planning and policy, broadly conceived. A companion piece by Stephen P. Crosby, currently University of Massachusetts/Boston Graduate School of Policy Studies Dean, explores the Collaborative's impact both direct and indirect on some state and regional issues, particularly on the issue of diversity, growing out of the Collaborative's work. The Collaborative's trajectory maybe uncommon for a public history organization, but it might offer some useful experience for other public historians.

We have sometimes told others that the Collaborative is "at the corner of history and innovation," as one as one of its Board members termed it.¹ The response of a good number of people, at first, is that they didn't know that such a corner existed. It is a corner that includes more people and organizations in public history than do more traditional corners (social history and political history). It seems to open up fertile fields for public historians.

How did this corner come to be? Let's start by looking at the context of

1. David Feigenbaum, Partner, Fish & Richardson, Board member, 2006, at Board retreat.

Greater Boston in the late 1990s. The Collaborative first arose from the coming together of three factors:² the renewal of popular interest in history; changes in Boston's physical, social, and cultural environment; and the state and city's recognition of tourism's economic importance. The renewal of popular interest in history—including African-American, immigrant, and social history—during recent decades was manifested in the return of histories and biographies to national bestsellers' lists. Television and movies reflected it, as well, in Ken Burns' documentaries, the "American Experience" PBS television series, the launch of The History Channel, and the run of Best Picture award winners with historical (or pseudo-historical) themes in the late 1990s.³ It showed locally in the flow of visitors to historical sites; three million visitors came to Boston in one recent year to walk the Freedom Trail and visit other historic and cultural sites.

Boston itself was undergoing a remarkable series of transformations. Physically the "Big Dig" was changing the space of the city, providing development opportunities for public uses, including parks and a proposed Boston Museum, and making the Seaport district accessible. Ethnically, Boston was becoming a mature multicultural city whose image, still dominated by the nineteenth-century Brahmin/Irish stereotype and by memories of bussing and bigotry from the 1970s, was in need of updating. Institutionally, the city's large number of independent cultural organizations, accustomed to defending their own turf, had begun to cooperate. A taskforce created to plan renovations to the "Freedom Trail," for example, had brought together some eighty historic sites and organizations.

At the same time the Commonwealth of Massachusetts and its capital city had come to the realization that tourism was an important part of the region's economy. Numerous studies noted the expansion of Boston's tourist attractions as a reason for its prosperity (the Convention and Visitors' Bureau estimated that for every 100,000 tourists who spend an extra day in Boston, an additional \$15 million of income is generated), and worried that the city was not doing enough to support this. Boston's Mayor, Thomas Menino, supported the idea that preservation and development could go hand in hand; the redevelopment of Quincy Market was the first "proof of concept" in the U.S.

The Collaborative's Beginnings

In 1996, I was a fellow at Harvard's Kennedy School taking a career break after starting and leading The Boston Management Consortium, a not-for-

2. Gerald Herman, "Using 400 Years of Boston History to Shape its Shape its Economy and Culture: Boston History & Innovation Collaborative 1997–2007," NCPH Conference, March 2007, Santa Fe, New Mexico.

3. *Braveheart* (1995), *The English Patient* (1996), *Titanic* 1997, and *Shakespeare in Love* (1998), for example.

profit related to re-inventing city government operations. My own background—with graduate degrees in U.S. history, sociology (Ph.D.), business administration, and economics, as well as a passion for Boston history—led me to begin to talk to people in my network about how to do things differently in the public history of this city and region, broadening beyond colonial and Revolutionary War history. From heading up the Consortium, I had developed a good network, which would be helpful in starting what would become known as the “History Collaborative.”

Only a few people took my ideas seriously in the first round of discussions. Just before giving up on the idea, I made one last effort—an “op-ed” column in the *Boston Globe* entitled “Making Historic Boston an Exciting Place to Visit.”⁴ The idea was picked up by then NPR Public Radio talk-master Christopher Lydon, who invited me to appear on his popular program “The Connection.” The Lydon show led to discussions with Pat Moscaritolo, the head of the Greater Boston Convention and Visitors’ Bureau, and with Gary Countryman, the Chairman and CEO of the Liberty Mutual Group, which is headquartered in Boston, who offered us space in the Liberty Mutual national headquarters to start things off and made the first financial commitment. Further meetings brought more support: Henry Lee, Board Chair of the venerable Massachusetts Historical Society; historian David Hackett Fischer; and Ira Jackson, a creative and powerful big bank Senior Vice President. The bank executive’s help broadened the group to include a national rock promoter who loves history, the Director of the (Boston) Museum of African-American History, as well as Northeastern University President and American historian, Richard Freeland.

By August 1997 a set of a strategic objectives for a new organization began to take shape. First, it would bring together a broad coalition of historians, business leaders, cultural and educational institution heads, tourism promoters, federal, state, and local government officials, technical experts, and management consultants. Second, it would seek to avoid competing with existing organizations, but instead form alliances among them and coordinate and utilize existing resources. Third, it would move back and forth between long-range planning and short-term activities that could test its larger purposes and add momentum and visibility and build confidence in the Collaborative. And, last, it would thus win over skeptics by bringing together larger groups of interested leaders around achievable goals.

A steering group—The Founding Committee—came next in November 1997 and a Board of Directors was named shortly thereafter. Each member of the Founding Committee was asked to contribute \$10,000 annually. The objective, as stated in 1999, was as follows:

The Boston History Collaborative is a broad alliance of institutions and individuals from many sectors of the city’s and surrounding region’s life—from dif-

4. *Boston Globe*, Dec. 28, 1996.

ferent occupations, generations, and ethnic groups—who share a common purpose, which is to make Boston’s heritage more accessible to all who live and work and visit in our city.

We were determined to develop four ideas beyond the revolutionary theme already embodied in the Freedom Trail that continues to be a major Boston tourist attraction. We went about it by collecting information about best practices in the U.S. and worldwide. We then conducted specialized focus groups in a variety of fields. One group was composed of historians from the region’s colleges and universities. Other focus groups of hotel concierges and “techies” were convened to look at what initial ideas of the more than twenty potential regional historical themes had “legs.” The Board made the final decision after we summarized all the data on about a dozen themes.

One other idea we worked on was support for a combined Visitor’s Center/Boston History Museum. This was an early initiative that Boston’s mayor turned down in May 1998. We were not easily discouraged though—we continued with four historical themes that seemed important to Boston history and to potential visitors to the region: literary, family/immigrant, maritime, and innovation history. Each of these four themes would have its own working group of historians, representatives of historic sites and hotels or restaurants connected with the theme, and sometimes management consultants to set goals, review staff research and the work of professional script writers, approve its final form, and work on revisions. Academics with a knack for public history like Northeastern University’s Professor Gerry Herman joined the “Innovation Odyssey Working Group,” while Suffolk University’s Professor Robert Allison joined the Boston by Sea (Maritime History) Working Committee and historians like the National Park Service’s Martin Blatt joined the overall Advisory Council.

Tales of the Trails

By the spring of 1998, planning for its first project—“The Literary Trail of Greater Boston”—had begun in earnest; and, a Web site for the Collaborative, hot linked to other Boston tourist sites, began being built. A Web-based Family and Immigrant History project soon followed, enabling people with roots in Boston to trace their families through maps and resources from the New England Historic and Genealogical Society, the New England Regional branch of the National Archives, the Massachusetts State Archives, and the Boston Public Library. Some forty local and ethnic history organizations participated in the phased development of this particular project, initiated by a challenge grant from the Massachusetts Foundation for the Humanities.

The Collaborative’s tours—built through the working committees on four different themes—were the hallmark of the organization’s first five years, and created both credibility and good will which the organization was able to draw

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Boston by Sea—a ninety-minute historical tour with live actors, singers, as well as video clips running on large screens on the cruise boat—took boatloads of visitors around the sites of Boston Harbor from the site of the Tea Party, to the actual site of the early eighteenth-century pirate hangings and gibbets, to USS *Constitution*. Children got to play in several of the dramatic historical skits.

upon later. Each of the tours (and Web sites) was developed to be a living experiment. If they garnered enough energy and revenue, they could be retained as “cash cows” to help the Collaborative or spun off to a commercial tour company like Boston’s Duck Tours or Old Town Trolleys. If one or another didn’t gather enough energy or revenue, we could shut it down. But more on this later . . .

The third Collaborative project, funded by hundreds of thousands of dollars from a variety of sources, including the Barr and Fidelity Investments foundations (both good-sized foundations based in Boston) sought to integrate Boston’s maritime heritage through both a self-guided walking tour along Boston’s new Harborwalk and a shipboard tour, run by a harbor cruise company. The “Boston by Sea” tour of the harbor was conducted by costumed actors and singers relating stories and songs of Boston maritime past as the boat passed the actual sites in the harbor, while showing sixty-second mini-documentaries on shipboard monitors about the history of the sites. A coalition of some two-dozen organizations, from the U. S. Navy and the U.S.S. Constitution Museum to the Boston Harbor Islands National Park participated in its development. After trying one or two playwrights, the Collaborative fixed

on playwright and director Jon Lipsky, who seemed to have a special ability to “bring history to life.” We made a decision to hire the best local sea shanty singer, David Coffin, and to have Lipsky team up with PBS documentary filmmaker Arnie Reisman to produce eight one-minute videos to be interspersed with live singing and the two-person live skits on the historical sites around the harbor. On a sunny day, with song, video, great actors, and a great script, involving kids as pirates and elderly visitors as “straight men and women,” Boston by Sea was, we felt, one of the best historic tours ever offered in Boston. For two years, before the downturn after 9/11, the tour drew nearly ten thousand visitors and school groups.

Launched in March 1999 with a fundraiser and supported by speeches by David McCullough and John Kenneth Galbraith and a prototype virtual tour conducted by an actor playing Louisa May Alcott, the Literary Trail tour consisted of a bus tour, a virtual tour, and a book-length guide published for the Collaborative by Houghton Mifflin publishing company.⁵ It brought together in a three-location tour downtown Boston’s literary sites, Cambridge, and rural Concord (Walden Pond, Louisa May Alcott’s home). It was created under Collaborative auspices by an alliance of fifteen cultural institutions including the Old Corner Bookstore, the Parker House, the Boston Athenæum, the Boston Public Library, Longfellow House, the Concord Museum, Walden Pond, and Orchard House. Its development was funded by grants from Houghton Mifflin, the Omni-Parker House, the Greater Boston Convention and Visitors Bureau, and the Massachusetts Office of Travel and Tourism. The *New York Times* ran a large piece the weekend of its first tours, and there was coverage in *USA Today*.

The Innovation Odyssey, the fourth theme and tour, was initially supported by Northeastern University, the law firm of Fish and Richardson (which specializes in patent law and which represented Alexander Graham Bell, among others), and Janice Bourque (builder of the Massachusetts Biotech Council). The Museum of Science (Boston’s number 1 drawing museum) was an early partner. The Innovation Odyssey focused on Boston as a hub of innovations—technological, financial, educational, medical, and social. Its Working Group had researched these inventions and innovations for a few years, but only with a lively script from Jon Lipsky did the tour of Boston and Cambridge come to life. It linked the sites of the telephone invention with MIT and Harvard, while integrating African-American innovation history with medical history. The dramatic pieces, the Arnie Reisman short videos that would be shown as the bus moved from site to site and acted as the tour’s connective tissue, took material that was not that interesting to the average visitor or resident, and made it livelier. This tour was very unusual. Only the revolutionary sites had really been linked in the city (the Freedom Trail), and to a lesser extent Black heritage and women’s history sites. But even with advertising, we never were

5. Susan Wilson for the Boston History Collaborative, *Literary Trail of Boston: A Tour of Sites in Boston, Cambridge, and Concord* (Boston: Houghton Mifflin, 2000).

able to build up the ridership of regularly scheduled Innovation Odyssey tours, and we served mostly educational or corporate groups.

Simultaneously, arising from the same impulse that created the Odyssey, the Collaborative's researchers and partners undertook rolling research projects on innovations that occurred in Boston over its four centuries and that could be shown to have changed the nation or the world. The project brought supporters to the Collaborative, such as the Massachusetts Biotech Council and Genzyme, which normally would not have supported public history. As Northeastern University's representative Prof. Gerry Herman said:

Extending the history of the city and its environs far beyond the colonial/revolutionary era celebrated by the Freedom Trail, the tours told, showed, and re-enacted the story of invention and application that maintained, rejuvenated, and re-invented Boston over its two hundred plus years since then, and continues to do so today. The Collaborative successfully walked a tight rope between providing accurate history and publicity for companies which wanted recognition.⁶

The research on the region's innovations would provide the base for the Collaborative's second six years.

The tours told the stories of technological (telephone, safety razor, microwave, instant photography, the Internet, inertial guidance, and genetic engineering), financial (commercial banking, the mutual fund, venture capital), medical (anesthesia, clean drinking water, baby formula, children's cancer treatments), educational (Harvard, Boston Latin, The MIT, Cooperative Education), and social innovation (abolition, the first World Series, "First Night"). Partnering with the local Fox television station, Public Service Announcements were developed and broadcast and a contest was derived from them for junior high school students to identify Boston area innovations, the prize for which was a free Innovations Odyssey tour for the winning class. Formal curricula were developed and distributed to area schools. Institutional and group discounts and inter-institutional cross-sales relationships were established. Customized versions of these tours were developed for businesses, universities, and professional organizations' conventions taking place in Boston.

Rolled out at the first Boston-hosted international Biotech convention, The Innovation theme yielded a coffee-table type booklet on The Innovation Odyssey, a play at the Children's Museum in Boston (*What's the Big Idea?*), and a children's book on innovation—*What's the Big Idea?*—published by Charlesbridge, a regional children's book publisher.⁷ Funds were raised from the Yawkey Foundation (generated by the Boston Red Sox) so that the play could go to four dozen elementary schools as part of their third grade social studies state-mandated local history year. *What's the Big Idea?* proved popular in the schools with teachers, and the companion book was an asset for it.

6. Innovation Odyssey Book (2003); Innovate Boston! (2006).

7. Stephen Krensky, *What's the Big Idea* (Watertown: Charlesbridge Publishing, 2008).

We were carrying out our original mandate to explore different public history audiences, and see what worked, and what didn't.

Using the knowledge gained in all the projects and the visitor perspectives learned with the various tours, the Collaborative staff began consulting research work as a way of helping to sustain the core work of the not-for-profit. The consulting for Boston real estate developers interested in the city's past and for project managers interested in capturing parts of Boston's heritage provided both an outlet for the Collaborative's staff and a revenue flow. The Collaborative has continued these activities along old wharfs on Boston's waterfront, where a "Harborwalk" routes joggers and walkers past historical sites. The Collaborative also worked on branding new (and old) developments with "drill down" histories of the sites, developing a "pocket museum" on the history of one wharf and historical signage/exhibits on two others. The three- and four-century histories of these wharves led to cementing strong relations with a number of harbor preservation groups and scholars.

In addition, the Collaborative has encouraged, supported, and assisted in the development of other historical projects in Boston, including the new "Economic Adventure" (the pocket museum of New England economic history at the Federal Reserve Bank of Boston) and the renewed planning for a museum dedicated to the history of Boston originally spearheaded by The Bostonian Society, which operates the site of the Boston Massacre and the Old State House.

The Collaborative's work, while based on broad working groups (alliances), has not always been smooth—this is the real world. There was tension early on with the Freedom Trail Foundation and with City Hall, quite understandable in a city where visitors have many things to choose from and getting charitable donations or selling tickets is never easy. A city government and mayor need to re-enforce a premiere destination like the Freedom Trail.

Unconnected with this came a crisis—largely financial—in 2004, as the revenue from the tours dropped and commercial companies, after careful consideration, opted not to take over the Collaborative's tours as for-profit ventures. As a result, the Board of the Collaborative reluctantly decided to focus on one of the four themes, and to take the Collaborative in this direction, a decision that fit with the original operating principal of focusing only on those projects that could sustain themselves.

At the Corner of Innovation and History: "Deep Branding" with History

Documenting innovations—social (e.g. the pivotal role played by both black and white Bostonians in the abolitionist movement) as well as scientific (e.g. first American lighthouse, telephone invention, the first organ transplant, etc.)—can get tedious. Doesn't every good-sized city have firsts? So what if Boston is older, and has more firsts?

We felt that an important insight came from the Collaborative's work: By

2003, we had come to understand that Greater Boston was one of the most innovative regions (“city/states”) in the world, and had continued to generate waves of innovation over its four centuries. As a non-national-capital city, Boston is in a small class with Florence, Venice, Edinburgh, and more recently Shanghai amongst others as a place that—at least for a few centuries—has generated an impressive number of innovations from various sectors. Home to Harvard, MIT, and six other major research universities, the area is viewed as an “intellectual capital,” but to use that phrase in describing a city might be seen as arrogant. The Collaborative, which launched its “innovation” theme in 1998, was ahead of other regions in its focus on a “branding” effort. Boston is known for not being a chamber of commerce city that toots its own horn. So branding wouldn’t come easily to the city even if a group agreed upon a way to do it. What the Collaborative really wanted to do was “deep branding”—not just giving the “innovation” moniker to the city for tourism and economic development reasons, but persuading residents to become part of an innovation culture—taking risks and educating the new generation to be iconoclastic and problem-solvers at the same time. As the Collaborative began to see the depth of the work, it began to advocate using the Collaborative’s new work on the “drivers” of innovation in policy situations. The more we moved in this direction, the more we have moved away from being a traditional tourist-oriented public history organization. But we are getting ahead of our story, and of our own organizational history.

Silicon Valley, Austin, San Diego, the North Carolina Research Triangle—all have an important stake in innovation today, and have had since after World War II or perhaps since the 1960s. However, the Collaborative’s research traced the history of the region’s innovations to the seventeenth century. Early social innovations included the “City on a Hill” the first public school and college in North America; scientific innovations included North America’s first inoculation for small pox in 1722.

Since 1998, the Collaborative has used its extensive network to inculcate the historical innovation theme into the regional culture. The Collaborative first proposed work on this as part of the city’s plans to celebrate the Millennium in 2000, in a competition sponsored by Boston’s Mayor, Thomas Menino. Although the project didn’t get funded in that competition, it led to a task force and to discussions among stakeholders.

The theme was picked up by a young, powerful organization, the Massachusetts Biotech Council, led by Janice Bourque, which by 1999 had become one of the top international centers for biotechnology. As noted above, the Council was planning for the 2000 world biotech meeting—BIO—scheduled to be held in Boston. Its members loved the “Innovation Trail” theme, helped to fund the Collaborative’s work, and hosted a Web site for it. The Boston newspapers covered the Trail, a two-hour guided tour.⁸ This led more

8. *Boston Herald*, March 31, 2000.



A two-hour bus tour of Boston and Cambridge with an actor/tour guide), Innovation Odyssey was live historical drama at several sites of innovation, as well as historic images on DVD overhead screens. The tour ran from 2001 to 2008. More than twenty-five organizations participated. Sites at Harvard Yard and along the Charles River are portrayed in the photos.

organizations, including the Museum of Science, to join the Working Committee. Soon the Innovation Trail became the *Innovation Odyssey* tour, with an actor and videos running on DVD screens on tour busses. The Convention and Visitors Bureau added it to the trails/themes for the city with the Freedom Trail and the Black Heritage Trail™.⁹

We presented Boston's Innovation history to a small group of key city leaders who were thinking about the opportunity to rebrand the city for its first ever major national political convention, the Democratic National Convention (2004). In a May 2003 meeting with the leaders of the city's leading financial firm, a major foundation, the leader of a Black ministerial alliance, and a few other "thought" leaders, the group decided to use the Innovation theme—and the collateral coffee table display booklet—as part of its marketing to the media who would come to the city in July 2004. The Boston Foundation included the innovation story as one of the key chapters in a book it sponsored—*The Good City*¹⁰—for the convention. The Collaborative, with funding from the Boston Foundation, published a new booklet on Social and

9. Annual Guide to Boston, 2002, Greater Boston Convention and Visitors Bureau.

10. Emily Heist and Ande Zellman, *The Good City: Writers Explore 21st Century Boston* (Boston: Beacon Press, 2004).

Innovation Takes Center Stage



The Boston History Collaborative published three reports on the history of innovation in Greater Boston from 2003 to 2006.

Not-for-profit Innovation, also for the convention.¹¹ It also helped to organize “Innovation Week” with thirty-two museums, organizations, universities, and companies participating in showing different forms of innovation over the region’s history. With Senator John Kerry as the Democratic standard bearer, The Democratic National Committee’s Host Committee worked with the Collaborative to get material on the Innovation theme distributed to 12,000 media staffers who came to Boston for the Convention. The Kerry presidential campaign felt that the “innovation” brand better captured Boston’s history than the Republican branding of the city as the nation’s “liberal capital.”

The theme got picked up, and Beacon Press recruited Lynda Morgenroth to write a book: *Boston Firsts: 40 Feats of Innovation and Invention that Happened First in Boston and Helped Make America Great*.¹² The glossy *Boston Magazine* picked this up, and had it as a front page “Smartest City in the World.” *The Boston Sunday Globe’s Ideas Section* had run a huge spread, “Innovation City” in June 2004.¹³ By this time, the Collaborative’s role was gradually fading into the background as a major city publicized something that a relatively small historical organization had originated. Increasingly, our role was to supply the examples and photo images.

The partnerships around the Collaborative and the ability to draw financial contributions from Greater Boston-based companies helped the organization to put a great deal into our innovative Awards program—it became part of the heart of the Collaborative’s success. Beginning in 2000, the Collabora-

11. *Boston’s Breakthroughs: 400 Years of Social and Nonprofit Innovations* (2004), Boston History Collaborative with The Boston Foundation.

12. Beacon Press, 2007.

13. Scott Kirsner, *Boston Sunday Globe*, (June, 6, 2004) “Innovation City: Why good ideas are born in Boston—But Don’t Always Stay.”

tive held a gala banquet each November to present its “History and Innovation Awards” to Boston individuals and institutions. For ten years, this has been a signature event of the Collaborative and a major event in the city’s public history community as well as its innovative sectors, bringing the historical world together with leaders from finance, healthcare, biotechnology, and information technology, as well as the major universities.

The Collaborative commissioned an original drama for each winner each year, to involve the audience and the media emotionally with the innovation breakthrough. The drama portraying the joint work of Children’s Hospital surgeon Judah Folkman and MIT engineer Robert Langer—a world famous duo in the past 10 years since the appearance of *Folkman’s War*—brought out both the humor and the sadness of their thirty-year effort to take on existing ideas about how to stop the growth of cancerous cells. Only after decades of being outsiders were they proven correct. The drama helped to bring together the technology sector (Langer’s work on how to get drugs through cell walls) and the healthcare sector (Folkman’s work) with venture capital, as well as public historians from around the region. The award was given the same evening as the Governor of Massachusetts gave an the Social Innovation Award to the five-member coalition that made the state the first to legalize gay marriage (“Marriage Equality”). The emotion in the room was palpable—again a multi-decade careful strategy had made this innovation happen, and the now “historical figures” were in the room.

Each year’s awards have added to the Collaborative’s research on how the city, state, and region have used innovation to overcome their resource and climate shortcomings and periods of bust or stagnation.

The combination of history, marketing, and branding leading the region to see itself differently has been, perhaps, the Collaborative’s biggest public contribution during its first decade. The story has been much larger than the History & Innovation Collaborative, but the organization’s role in researching it, launching it, developing an archive of images, and getting the city’s leaders to recognize the city as home to innovation waves which have been repeated over time led to a number of the leaders taking the theme very seriously indeed.

Why Boston Is So Innovative, and What that Can Tell Us

Beginning in 2004, we re-oriented the full Collaborative to look at the why Boston has been innovative over many centuries—as a way of contributing to the public debate on why the region might be losing its edge, and what could be done about it. In 2006, we changed our name to acknowledge what we had become, the *Boston History and Innovation Collaborative*.

In late 2003 and 2004, the Collaborative compared notes with leading academics at Harvard (Ed. Glaeser) and MIT (Ed Roberts and Peter Temin), and developed along with Glaeser an account of why Greater Boston has stayed

innovative, in spite of four major downturns in the nearly four centuries since 1630. The Collaborative received funding from the Massachusetts Technology Collaborative—John Adams Innovation Institute for a unique research study that looked back at why innovations had occurred in Boston. The study was published in March 2006—*Innovate Boston! Shaping the Future from the Past: Four Amazing Centuries of Innovation*. We consciously made the study one that would appeal to journalists and more casual readers of history by printing it in color with plenty of historical images, and having sidebars with historical examples alongside the images and text on each of the nine eras. As Steve Crosby’s companion article reports, the study was well received and has made a sustained impact.

To research the four-century history, we turned the Collaborative’s public history work into a historical inquiry into what drives innovation. The Collaborative recruited a new level of leadership for the organization—the Boston 5th Century Trustees—people who were committed to using the results of the work to inform current decisions as to how to keep the region competitive. We included the Trustees in the research of 2005–06. The Collaborative’s work was more than business history; we would look closely at the interaction between scientific and social innovation and at recent work by Richard Florida on what leads some regions to be more creative than others.¹⁴

We selected sixty cases of innovation from the three hundred cases in our database to examine in detail. The Working Committee and associated researchers and students from the Boston’s college and university graduate and public history programs had developed the database during seven years of research. The cases were purposely chosen from different eras of Boston’s socio-political history, and from different “buckets” (e.g. social innovation, medical, information technology). They included all the innovations that the National Inventors Hall of Fame (Akron) lists for Greater Boston, as well as those Boston breakthroughs included in the popular histories.¹⁵ Working under the guidance of an Academic Research Committee with leading New England economists such as Glaeser and Northeastern University’s Barry Bluestone, historians, and other innovation scholars, the Collaborative developed credibility for its work. Each of the sixty cases was analyzed in a short written summary by a Collaborative researcher. We then took thirty-five theories about why Boston is innovative (such as “it has no natural resources,” or “it’s all the rivalry between Harvard and MIT”), distilled from them a list of twenty-seven “factors,” and had the staff researchers rate on a scale of 1 to 5 every factor’s impact on each of the sixty cases, asking which of the factors had an impact on why this particular innovation occurred, why it happened in Boston, and why it happened when it did.

14. Richard Florida, *The Rise of the Creative Class* (New York: Basic Books, 2002), *Cities and the Creative Class* (New York: Routledge, 2005).

15. For example, Howard Evans, *They Made America: Two Centuries of Innovators* (Boston: Little Brown, 2004).

After the staff researcher had analyzed the case by each factor, we held a research seminar on the case, and often challenged the ratings and conclusions. An academic review panel scholar also read through the case and did an independent review of the rating on each “factor” or, as we came to label them “drivers.” We had no idea whether we would come out with useful results or conclusions that would fail to aid us in our search for consistent drivers that might help explain Boston’s unique innovative history. We worked with statisticians to run numbers, and to test by each historical era. The entire process was nerve-racking and challenging.

Early in the study we came up with a new set of eras into which to divide Greater Boston’s post-encounter history. Using primarily economic (boom/bust) and social history dividing points, we found that Boston’s innovation history fit into nine eras.¹⁶ The first three eras, for example, divided like this: 1629 to 1640, “Farm town—But the land bubble bursts”; 1640 to 1730s, “Re-invented town—Salt cod trade with West Indies drives a boom town. Slavery. Boston is #1 in British North America, #3 port and shipbuilder in British Empire”; and 1730s to 1783, “Stagnation. Revolution—Most glorious moment, and ruin, 85% of population goes or dies—will Boston come back?”

When we analyzed the sixty cases and looked at the intuitive and the statistical results, we found that there was a pattern in the factors across the eras. We had been deeply skeptical that a largely quantitative analysis would show us very much. Instead we found that it showed that there had been five or so main “drivers” (the factors) that had driven innovation in most of the nine eras. These drivers appeared not only in the nineteenth and twentieth centuries, but also less spottily than we had hypothesized in the seventeenth and eighteenth centuries. Our research team was surprised. We reconfirmed what we found with our academic review committee, and with statisticians.

Innovation’s Five Major Historical Drivers

The careful research showed that across the sixty cases through Boston’s nine eras there have been five major drivers of innovation: entrepreneurship, networks, local funding, local markets, and national/global markets. *Entrepreneurship*, featuring leader(s) who think and act outside of the usual box, coalesced through groups, as was the case with the Boston Associates, a group of entrepreneurs including Lowell, Appleton, Jackson, and others, who set up the first factories in Waltham and later Lowell, or more usually through a single entrepreneur like Cambridge’s Elias Howe and his sewing machine, or Dr. Joseph Murray, who in 1954 led the first organ transplant at Brigham & Women’s Hospital. *The Boston network or cluster*, where individuals and groups worked across silos, trading information, ideas, and services, is exem-

16. For our purposes, political eras proved not often as relevant as the boom/bust cycles.

High Five Drivers by Era-Bartone Graph

	ERA 1 1629 - 1640's	ERA 2 1640's - 1730's	ERA 3 1740's - 1780's	ERA 4 1780's - 1820's	ERA 5 1820's - 1850's	ERA 6 1850's - 1890's	ERA 7 1900's - 1930's	ERA 8 1940's - 1970's	ERA 9 1970's - present
Entrepreneurship									
Local Networking / Cluster									
Local Demand									
National / Global Market Demand									
Locally Funded									

The Literary Trail of Greater Boston coalition included twenty-seven sites and organizations, as well as three hotels in Boston, Cambridge, and Concord. Half-day bus tours ran for several years. (Photo by Susan Wilson)

plified by the fierce debate in Boston between black abolitionist David Walker and white abolitionist/journalist William Lloyd Garrison. Their exchange helped to spur a social innovation, the abolitionist movement in Massachusetts, by drawing attention and expanding the number of people involved in the issue. The third driver, *local funding*, or capital and financing from Bostonians and local institutions, was central for example to King Gillette’s development of the safety razor, the birth of state-chartered banking, and Georges Doriot’s development of the venture capital model in the 1940s. *Local demand*, when innovation responded to a demand created by Bostonians, was the fourth driver. It helped to get Dan Bricklin’s Visicalc, the first electronic spreadsheet, off the ground because there was a local market exemplified by the Boston Computer Society, a user group founded in the mid-1970s. The fifth driver, *national, Atlantic, or global demand*, often prompted local innovation, as with the lucrative salt cod trade in the seventeenth century, mass-manufactured textiles in the nineteenth, or Ned Johnson inventing check-writing off mutual funds in 1976. Some combination of these five drivers explains why the majority of the sixty innovations studied happened, and happened in Boston, and happened at a particular point in time.

We observed that of the five drivers, most are local—four of five. Taken together we came to call them the “Bump and Connect.” The phrase evolved from discussion of preliminary findings with our 5th Century Trustees. Harvard’s Provost Steven Hyman suggested that our finding was quite similar to what Harvard Medical School had found in designing research buildings: innovation happens better where laboratories from different disciplines, such as a cancer lab and a cell biology lab, are located next to one another (with a café in between). The two groups of scientists in the labs have a higher “bump

rate,” and this leads to hypothesizing that might not happen without intentionality. *Boston Globe* columnist Ellen Goodman felt that “bump rate” sounded a bit too combative—she preferred the phrase “bump and connect rate.” And so the Collaborative became known for its important—and catchy—“bump and connect” finding.¹⁷ Here is how we defined it: Planned and unplanned meetings among entrepreneurs, funders, and researchers due to their close proximity, including collaboration across and within industries and clusters, as well as professional and social networking.

Our research led us to further conclusions. One was that you miss important insights about innovation and history if you look primarily at the twentieth century for Boston. Most studies on regional innovation have looked only at city innovation since the 1940s and the invention of the research university.¹⁸ Yet there is something special about a city-state that has had a four-century run which makes it different than innovation competitors such as Silicon Valley or North Carolina that have ridden the innovation wave for fifty or seventy-five years. The ability to continue as a center of innovation for a number of consecutive centuries is highly unusual for a city/state. We have not had the funds or resources to conduct comparative urban innovation histories on the scale of what we have done on Boston, so we cannot say conclusively that most “innovation” cities are more like Detroit (autos), or Dayton (bikes and airplanes), or Hartford (integrated metal parts, e.g. revolvers and sewing machines), or what best explains their different duration in innovation. But we can only understand why Greater Boston is one of a *very few* longstanding innovative regions in the nation, if not the world, if we review the history of innovation in the city over the four centuries of its existence.

The long scope of the study led us to another conclusion, that in Boston’s four-hundred-year run of innovation, the town and city has re-invented itself at least four times, as Harvard’s Ed Glaeser points out.¹⁹ That happened in the 1640s, the 1780–90s, the 1850–60s, and the 1950s–1980s. We found using a statistical study that drivers within the innovation cocktail often reinforced each other, in these moments of reinvention as well as other times. This conclusion has had significant implications for the Collaborative’s innovation action agenda, as has one more: that innovation in Boston has been, in terms of race, gender, and ethnicity, more inclusive over the past few centuries than many think.²⁰

We found that there was a strong *interplay* between technical and social innovation in many of the cases we have studied, twenty-two of sixty. As part of this, we found that Boston’s innovation tradition is not only white and male. Alexander Graham Bell had a team with Lewis Latimer, an African American

17. As well as a variety of hilarious variations of it, down to the “bump and grind rate.”

18. Michael E. Porter, Clusters of Innovation Initiative, Monitor Group, on the Frontier, Council on Competitiveness, 2001.

19. Edward Glaeser, “Reinventing Boston: 1640–2003,” Working Paper 8, Rappaport Institute, October 30, 2003.

20. Stephen Crosby, “Public Policy and the History Collaborative,” in this issue.



*Boston College
Citizen Seminar
March 2006*

In 2006, the Collaborative released its *Innovate Boston* report on the five factors which have driven Boston's ability to come back with new waves of innovation over nearly four centuries.

Lower left: Citizen Seminar panelists include Peter Slavin, M.D. (President of Massachusetts General Hospital), Bob Smyth, M.A. (President of Citizens Bank), Dr. Phil Clay (Chancellor, MIT), and Ellen Goodman (*Boston Globe* columnist). *Upper right:* One of breakout groups; more than three hundred people attended the meeting. *Lower right:* Steven Crosby, History Collaborative Board Chair, explaining a point to historian Dr. Richard Freeland, President of Northeastern University.

who would later be a key engineer working with Edison. The famous Boylston small pox work was founded on the testimony of an African slave, Onesimus, who had come to Boston from the West Indies. In the invention of baby formula, one of the two key chemists was a local woman, Louise Giblin. In all three cases, until the Collaborative's original research, no one had made a point of saying that the teams were socially diverse. As these examples suggest, we have documented that immigrants and African Americans have been important factors in new ideas and social movements and that women have played a consistently critical role from the first years of settlement through the eighteenth and nineteenth centuries to the region's current years as an innovation culture. Historical research changes perception.

“It's the Bump and Connect”

Even in today's digital world, business leaders and the leaders of our universities report that the “bump and connect” phenomenon is a determining factor in the decision to locate or keep companies in the Boston area. The decision by Novartis (the world's biggest pharmaceutical firm) to relocate their main research labs from Switzerland to Central Square in Cambridge was made because of the site's proximity to the Massachusetts General Hospital,

MIT, Harvard Medical School labs, and Harvard classrooms—the “bump and connect” idea—according to Bernard Aebischer, Global Head of Research for Novartis. Similarly Merck, another of the world’s largest drug firms, which had no location in Greater Boston before 2002, located a major laboratory in Boston right next to the Harvard Medical research labs for the same reason as Novartis—the ability of key researchers to randomly “run into” colleagues from different disciplines, according to Merck’s executive overseeing the decision, Robert Gould.²¹

The History and Innovation Collaborative’s work on what has driven innovation over time in the Greater Boston region appears to be mirrored by current major research investment decisions by companies or universities. This bump and connect phenomenon, founded on the city’s historical drivers of innovation, is Greater Boston’s “DNA,” continuing to make Boston, Boston—at least right now. It may also be the DNA of other cities/regions that are innovative over centuries. Time, and further public history research, will tell.

The completion of research was only one phase of the public purpose for the project. On March 9th 2006, Boston College and the Collaborative convened three hundred Greater Boston leaders, social activists, historians, and others in a major civic forum, the Boston College Citizen Seminars, for the release of the *Innovate Boston!* report. We had participants brainstorm in facilitated groups and report back, after which we launched a public discussion on Boston’s innovation. For four months to follow, we convened large and small groups and presented the conclusions to a number of audiences. As Stephen Crosby’s accompanying article reports, the project has had some continuing effect.

In early 2009, the Collaborative voted to merge with the Boston Museum as soon as the Commonwealth of Massachusetts designated a site along the Rose Kennedy Greenway, next to Fanueil Hall. The museum looked to the Collaborative to develop the program, the content, for the museum; the new museum is to include a gallery on the history of innovation in the region. At the same time, the merger will help the Collaborative’s recession-driven decline in donations. As of the writing of this article, no decision has been made by the state government, so the merger has not been finalized. This has stymied both the museum and the Collaborative, and added to the risk that all not-for-profits have faced in the recession.



The Collaborative began with the intent to show that Boston, as a multifaceted, dynamic city, had a multidimensional history as well. We were convinced that the city shouldn’t be defined solely by events that occurred two centuries earlier. The Revolutionary story is just one of the city and region’s many stories.

21. Bernard Aebischer, Novartis, interview by Robert Krim (June 2005). Robert Gould, Merck, interview by Robert Krim (October 2005).

We had begun as a lab for doing public history, with the intent to focus over time on themes that generated public energy. As the years went by, and more research was completed the Collaborative recognized a theme that was central to Boston's past, present, and, we hoped, its future: innovation. Stories of innovation, of challenging the conventional wisdom and taking on prevailing ideas of the day were apparent in the colony's earliest years, the Revolutionary period, and the abolitionist period, continuing in the present with biotechnology development. We changed the Collaborative's structure, and even some of our mission, over time to reflect the people and institutions who became vitally interested in the region's history when we reframed it around themes, stories, and sites that helped them to understand what defined the region. Our work carried us into a very broadly defined realm of public history where public policy, history, and innovation bump and connect at what has proven to be a very busy corner of history and innovation.

ROBERT M. KRIM, executive director and founder of the Boston History and Innovation Collaborative, has a multidisciplinary academic background: M.A. in U.S. History (UC Berkeley), Ph.D. in Sociology-Organization Studies/MBA (Joint from Boston College), M.A. in Economics (Goddard), and B.A. Political Science (Harvard). His career has spanned reporting on the 60s movements for *the Washington Post*, a decade as a faculty member in business and history at the predominantly minority Roxbury Community College in Boston, a decade in Boston City Hall, and then heading up a not-for-profit partnership with city government to work on organizationally innovative solutions to Boston's urban problems (e.g. community policing), and finally the Collaborative. A native, Boston public history has always been his passion.