

## Informing Policy and Responding to Crisis

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### The Making of “Idaho’s Response to the 1918 Influenza Pandemic—ISHS Briefing Paper No.1”

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**ABSTRACT:** This article explores historians’ role in shaping public policy amid crises through the programs of the Idaho State Historical Society (ISHS). ISHS navigated the post-2008 recession, aligning with the History Relevance Campaign to redefine history’s societal value and develop a legislative outreach program. This article encapsulates the ISHS’s journey and history’s power—through the agency’s new briefing paper program—to inform, unite, guide policy, and promote informed governance. The article describes the author’s workflow, which features traditional research methodology and adaptable project management philosophies and stresses the value of searchable research libraries as a framework for historians to manage multiple projects.

**KEY WORDS:** Idaho history, public health, COVID-19 pandemic, state government, historical research methodology, agile project management

In April 2020, I wrote an op-ed that appeared in several newspapers across Idaho, touting historians’ important role in times of crisis. Because historians have specialized training to examine and interpret the past, we are positioned to help when disaster strikes, perhaps not in the same way an emergency medical technician (EMT) can deliver lifesaving CPR, but certainly in a peripheral way. By providing historical context and analysis about the manifestation or implications of current events, historians can calm the public’s fears, provide understanding about the past, and help leaders make more thoughtful decisions that may impact the future. These skills proved especially critical during the COVID-19 pandemic as historians and scholars across the country jumped to the ready to contextualize the emerging pandemic for the public—or, in my case, for Idaho’s elected leaders—through the lens of historic health emergencies, the most notable being the 1918 influenza pandemic that impacted the globe and killed more Americans than the trench warfare of World War I.<sup>1</sup>

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<sup>1</sup> Howard Phillips, “The Re-Appearing Shadow of 1918: Trends in the Historiography of the 1918–19 Influenza Pandemic,” *Canadian Bulletin of Medical History* 21, no. 1 (April 2004): 128.

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What might happen when historical context can be developed quickly enough to inform public policy decisions in response to a crisis, and what does it say about the elected leaders who know to include historical context in their arsenal of resources when developing public policy? My 2023 Michael C. Robinson Award-winning historical analysis, “Idaho’s Response to the 1918 Influenza Pandemic—ISHS Briefing Paper No.1,” is one answer to these questions. This “Report from the Field” explores this briefing paper’s conceptualization, methodology, impacts, and outcomes and includes an exploration of the relationship building that spanned years and was necessary to build trust between the Idaho State Historical Society (ISHS) and other entities within state government to ensure the paper’s success. I hope that in sharing my process for writing this analysis and developing what now exists as the State Historian’s “briefing paper program” that others employed in government or those consulting with partners in the public sector can deploy historical analyses as a means of practice to impact public policy decisions at the federal, state, and local levels across the country.

In 1907, the ISHS became a component of state government. Although our placement within the state system has shifted and moved, and our staff size has grown and professionalized over the decades, our mandate to preserve and disseminate information about Idaho history has remained as steadfast as when we first began as a volunteer organization in 1881. Since 2007, the ISHS, under the leadership of Executive Director Janet L. Gallimore, has demonstrated its value to the citizens of Idaho and its elected leadership in several strategic ways. One key to our success has been the thoughtfully crafted legislative outreach program delivered annually to comprehensively connect the agency and its services to Idaho’s executive and legislative branches.<sup>2</sup> The program’s development and execution provided the foundation upon which the agency’s new briefing paper program later developed and found success.

Each fiscal year, the ISHS leadership team, comprised of the executive director, division administrators, and key department leaders, including myself, plans a wide-ranging and broad-based legislative outreach program to raise the agency’s profile and share priorities and initiatives with elected officials at the federal and state levels.<sup>3</sup> The program’s framework focuses on major initiatives, strategic

<sup>2</sup> The ISHS legislative outreach program has varied slightly from year to year. Recent years have included strategic communications, publications, events (including legislative receptions), field visits, tours, a capitol curation program that features exhibitions in the Idaho statehouse, program support for the House and Senate upon request, and support for the First Lady, constitutional officers, and Legisladies and Gentlemen upon request. A required component of our legislative program is our formal budget presentation at JFAC. Following this formal presentation, the State Historian delivers the artifact/archival document presentation to the committee and full House and Senate. For details about the type of information included in the formal budget presentation, see Idaho State Historical Society FY 21 Budget Request, Idaho Legislative Budget Book (February 2020).

<sup>3</sup> ISHS defines its legislative outreach program as a component of its marketing strategy to engage with the legislature to illustrate the value of existing ISHS activities, events, and programs and an opportunity to solicit support for new activities, events, and programs. It is not an effort to support specific legislation for enactment into law.

communications, programs, media opportunities, and key events and seeks to identify opportunities for additional engagement based on the agency's annual and strategic plans. One of the cornerstones of our legislative outreach program is an accompanying presentation that I prepare with the support of my colleagues and deliver to the Legislative Joint Finance and Appropriations Committee (JFAC) and on the floors of the Senate and House of Representatives after our executive director presents the agency's budget request. These presentations, which display an original and highly relevant archival document or artifact, usually mark the beginning of our annual efforts to deliver meaningful context about the history of Idaho's systems, institutions, laws, and sites to those responsible for governing the Gem State. Most importantly, in the time spent with legislators during these presentations, we leverage the document or artifact at hand to communicate our value and essentiality to state government, while also increasing our agency's visibility and connecting it to multiple levels of government enterprise, ensuring that our government stakeholders understand and see ISHS as *indispensable to their work*.

As an example, in February 2020, the agency was planning several events and activities as part of our legislative outreach program to commemorate "Idaho Women 100," the agency's co-led commemoration of the centennial of women's suffrage that had been in development with the nonprofit Idaho Women in



Members of the Idaho House of Representatives during the ISHS archival document presentation in February 2020. (Idaho State Historical Society)



Members of the JFAC examining Idaho's original Admission Bill and photograph of Idaho's Territorial Secretary, Edward J. Curtis, during ISHS's archival document presentation. (Idaho State Historical Society)

Leadership (I-WIL) and other stakeholders from across the state since 2018. As part of this effort, I delivered our archival document presentation to JFAC and the full House and Senate illuminating the history of Idaho's ratification of what became the Nineteenth Amendment to the US Constitution ending exclusions on voting rights based on sex.<sup>4</sup> The archival document displayed during the presentation was Idaho's certified copy of "House Joint Resolution No. 1," by Representative Emma Drake, passed on March 18, 1920, by the Fifteenth Session of the Legislature of the State of Idaho.<sup>5</sup> The 2020 presentation theme and document strategically teased a kick-off event for "Idaho Women 100," scheduled for the statehouse steps on March 13, 2020.

This document represented an important piece of Idaho's political and suffrage history, for it placed the office of Idaho's governor and the Idaho legislature within

<sup>4</sup> Director Gallimore and her leadership team first presented an artifact for consideration to JFAC and the House and Senate in 2009. Annually since then, Director Gallimore and members of her leadership team have presented in front of these bodies as part of the agency's legislative outreach program.

<sup>5</sup> Box 20030050, Legislative Bills, 15th Session, 1919, Senate Bills, 143-195, Resolutions and Memorials, Special Session, 1920, House Joint Resolution No. 1., By Drake, A Joint Resolution Ratifying the Proposed Amendment to the Constitution of the United States Extending the Right of Suffrage to Women (February 18, 1920), AR 3, Records of the Idaho Secretary of State, Idaho State Archives.

the national narrative of suffrage and constitutional amendments. The decisions and actions of Idaho's elected officials between 1919 and 1920, as represented by the "House Joint Resolution No. 1," meant that nationally, women voted in a presidential election for the first time in American history in 1920. Additionally, and perhaps most importantly, this historic document recognized the privilege that Idaho women enjoyed for twenty-four years prior to 1920—as Idaho was the fourth state in the country to enfranchise its women via a state constitutional amendment in 1896—and the responsibility that Idaho exercised in extending that privilege to its women across the state.<sup>6</sup> In sharing this document and other anecdotes from Idaho's past—such as context about the selection of the state capital and construction of the capitol building; the admission of Idaho as the forty-third state in the union, and its acquisition of land via various land grants outlined in its admission bill; and information about Idaho's tribal, territorial, agricultural, industrial, and cultural past—we continually maximize touchpoints to illustrate to our lawmakers the value of history and educate them about its methods and the uses to which historical knowledge can be applied in making decisions that will affect the future.<sup>7</sup>

For the last sixteen years, the agency, via its legislative outreach program, has achieved broad and long-term impacts and measurable short-term outcomes. For one, in monitoring the visitation of legislators at our Boise-based sites—the Idaho State Museum and the Old Idaho Penitentiary—during legislative sessions, we measure the impact of our legislative outreach program in terms of engagement with lawmakers. Additionally, legislators occasionally reach out to our staff despite the support from the Legislative Services Office.<sup>8</sup> In these requests, they often seek knowledge or evidence of what transpired relative to a particular industry or event from the past. In recent years, requests from legislators have required deep analysis and research into original archival materials on Idaho's historic mineral production and tax revenue from said sources, information on state ownership of land and

6 For more information about Idaho's suffrage history, see Rebecca Scofield and Katherine G. Aiken, "Balancing Act: Idaho's Campaign for Women's Suffrage," *Western Legal History: A Publication of Ninth Judicial Circuit Historical Society* 30, no. 1 & 2 (2019): 32–44.

7 ISHS defines the value of history through many lenses. Firstly, the agency embraces our role in state government as one of providing an accurate historical context to understand current challenges, triumphs, and events more fully. Additionally, we view the field of practice and the development of historical analysis and interpretation specifically as valuable processes to augment and bolster other types of analyses, such as financial or technical. Lastly, we recognize the value of history as a pathway to generating heritage reverence within society. When we talk about history with intentionality through these lenses, we commit to seeing history play a greater role in our communities, our decision-making, our education systems, and in the lives of our fellow citizens. Through our work to make history essential, we aspire to move the entire field from nice to necessary.

8 The Idaho Legislature created the Legislative Services Office in 1993 to "consolidate the nonpartisan staff support to Idaho's citizen legislators." The Legislative Services Office includes the following divisions: legislative audits, budget & policy analysis, research & legislation, and information technology. ISHS provides deep historical analysis of the materials requested from legislators, while LSO provides access to a small assortment of more recent materials housed in the reference library at the state capitol.



Idaho State Historian HannaLore Hein presenting about Idaho's admission to the Union to the JFAC during the 2022 legislative session. (Idaho State Historical Society)

property, and details related to Idaho's constitutional rights regarding education and voting. Legislators also request assistance in drafting memorials, concurrent resolutions, and other legislation, especially to honor significant moments in Idaho history, such as the Sunshine Mine Disaster of 1972, topics related to women's suffrage, state parks history, and more. Their inclination to turn to us as a resource capable of delivering timely and comprehensive responses is a further testament to the long-term impact of our legislative outreach program. Lastly, we consider the support of our agency's mission and initiatives as a metric of success for the engagement sought through our legislative outreach program because broad support of our appropriation ensures that we can continue to deliver the services and programs that impact lawmakers and their constituents across the state.

However, of all the long-term impacts and short-term outcomes of this program, perhaps the most significant impact has been the relationships that staff have built with individual legislators and their staff, including those lawmakers who have carried our budget through the legislative process, others who attend our programs and advocate for our work, and the relationships we have built with the executive branch. These relationships are evidence of the time our agency directs to stewarding our place within state government, and our effort to increase the relevancy of our work to these key stakeholders via our carefully crafted outreach program.

The groundwork laid in conceptualizing and executing the agency's legislative outreach program proved especially valuable as the profession and industry

suffered in the wake of the 2008 economic recession. Although admission trends at historical institutions had been declining since the 1970s, data from the early 2000s indicated that younger crowds were losing interest in the past, or they at least had lost interest in how museums and other historical entities presented information about the past.<sup>9</sup> The economic downturn that resulted from the 2008 subprime mortgage crisis did not improve these trends. Studies suggested that visitors struggled to connect with the content museums and historical organizations produced, and other data points indicated that the field was simultaneously experiencing a “paradigm shift” away from viewing museums and historical entities as significant to instead viewing them through a values-based approach and using criteria to determine their societal worth.<sup>10</sup>

While professionals around the world were beginning to see this shift, leaders at historical societies and national organizations in the United States, including the leadership at ISHS, were aligning over the challenges of the post-recession landscape and sought solutions to streamline the language around values, criteria, and standards which museums and all history and heritage entities needed to embrace to weather the economic storm and come out stronger on the other side. In 2013, the History Relevance Campaign, an “informal grassroots effort made up of public historians, preservationists, educators, historic site managers, and museum leaders who [were] creating a national, broad-based strategy to assert the relevance of history” emerged as part of this solution.<sup>11</sup> ISHS Director Gallimore served on the steering committee for the campaign, together with colleagues representing other leading institutions and entities across the country, including Tim Grove with the Smithsonian Institution, John Dichtl, then representing the National Council on Public History, Kim Fortney with National History Day, Kent Whitworth, Executive Director of the Kentucky Historical Society, and others. The steering

9 Cary Carson, “The End of History Museums: What’s Plan B?,” *The Public Historian* 30, no. 4 (2008): 17.

10 Carol Scott, “Using ‘Values’ to Position and Promote Museums,” *International Journal of Arts Management* 11, no. 1 (2008): 29.

11 Max van Balgooy, “A Campaign to Make History Relevant to Americans,” *Engaging Places* (blog), December 18, 2013, <https://engagingplaces.net/2013/12/18/a-campaign-to-make-history-relevant-to-americans/>; American Historical Association, “History, the Past, and Public Culture: Results from a National Survey - How Does the Public Define ‘History?’,” <https://www.historians.org/research-and-publications/history-the-past-and-public-culture-results-from-a-national-survey/1-how-does-the-public-define-history>. Although the History Relevance Campaign began in 2013, and has produced various documents, convened steering committees, and organized focus groups, the organization did not define what it meant by “history” in its public facing documents. Records of the organization likely exist in the individual files of participants, but the organizational records have not been compiled as a body of record in an archival setting that I could locate to see if the organizers grappled with the definition of history. The American Historical Association (AHA) acknowledged that practicing historians have a sophisticated idea about what history is, but that likely definitions among professionals are “complex and nuanced” and likely share little with the public’s definition of history. In an AHA study that queried the public for their definition of history, a “sizable majority” equated history with “nuts-and-bolts” factual materials as opposed to explanations about the past. Additionally, respondents favoring an “explanatory view of history showed signs of greater interest in, and perhaps empathy for, peoples and events far removed from the respondents.”

committee engaged professionals in museum studies, archives and libraries, history, heritage tourism, cultural resource management, education, government, consulting, and more and gained valuable insight that reflected the public, private, and nonprofit perspectives in the United States.

The steering committee conducted focus groups and solicited feedback on draft documents for two years and released the “Value of History Statement” in 2015, which identified seven specific criteria detailing how and why history is essential.<sup>12</sup> In developing these criteria, it became clear that the relevance of history and the profession are rooted in how people can use knowledge of the past to aspire to more, to think critically, to develop personally, to grow the economy, and to establish a solid foundation on which people can envision a brighter future and set up future generations to build and benefit from a more democratic society. However, the most critical criteria for my work and the briefing paper program imagined in 2019 detailed history’s impact on providing understanding and viable solutions.

The History Relevance Statement describes the impact of our work for ourselves, our community, and our future. The sentiment that “weaving history into discussions about contemporary issues clarifies different perspectives and misperceptions, reveals complexities, grounds competing views in evidence, and introduces new ideas” all for the purpose of creating “greater understanding and viable community solutions,” speaks to an essential component of a democracy—an engaged citizenry. This sentiment is as critical for leaders in state government to embrace as it is for the general public.<sup>13</sup> In May 2015, following the release of the

12 History Relevance Campaign, “Value of History Statement,” November 1, 2018, <https://www.historyrelevance.com/value-history-statement>. The Value of History Statement outlines seven ways history is essential. “Identity: History nurtures personal and collective identity in a diverse world; Critical Skills: History teaches vital skills; Vibrant Communities: History is the foundation for strong, vibrant communities; Economic Development: History is a catalyst for economic growth; Engaged Citizens: History helps people envision a better future; Leadership: History inspires leaders; Legacy: History, saved and preserved, is the foundation for future generations.”

13 History Relevance Campaign, “Value of History Statement,” 2018; History Relevance Campaign, “Value of History Statement,” December 2016, Director’s Files, Janet L. Gallimore, Idaho State Historical Society. The full content of the 2018 Engaged Citizens criteria within the Value of History Statement states: “History helps people envision a better future. Democracy thrives when individuals convene to express opinions, listen to others, and take action. Weaving history into discussions about contemporary issues clarifies differing perspectives and misperceptions, reveals complexities, grounds competing views in evidence, and introduces new ideas; all can lead to greater understanding and viable community solutions.” However, in earlier drafts of Value of History Statement the steering committee included language that spoke more directly to the impact of historical analysis, and not “history.” In the 2016 version of the Value of History Statement, the Engaged Citizens section started with language about solutions, stating, “History helps people craft better solutions,” and that “bringing history into discussions about contemporary issues” leads to “more effective solutions for today’s challenges.” Using the final 2018 Value of History document as the broadest foundation for professionals in the field of museums, historic preservation, public history, and even archives and libraries to conceptualize history’s essentiality for our future allows for those professionals to approach and incorporate historical analysis through their own lens or expertise. This was the thinking that I incorporated as I conceptualized the briefing paper model as the necessary analytical component that is critical to ensuring that Idaho’s leaders are truly engaged and also prepared with facts about the past and an analysis of the impacts, causation, or implications of



first iteration of this statement, the History Relevance Committee convened a task force comprised of Kent Whitworth (Kentucky), Janet Gallimore (Idaho), and Peter Barton (Nevada) to discuss the goals and next steps of engaging the History Relevance Campaign with the National Governor's Association. With the help of the state historical society administrators, this task force developed an action list that executive branch leaders could consider to "promote history's value within the universal gubernatorial priorities of education and workforce development, advancing economic opportunity, and building vibrant communities."<sup>14</sup> In 2016, the History Relevance Campaign delivered a document titled "Action for Governors," which aligned with the "Value of History Statement" and condensed into a simple two-page infographic a concise call-to-action for governors to follow in actualizing and operationalizing elements of this statement.<sup>15</sup>

The document called out the challenges and opportunities that face society and democracy, workforce development and education, and economic development. Here, the History Relevance Campaign promoted the idea that history can serve as a tool for leaders and society in addressing specific needs. The document noted, "society is divided on how to solve many of the problems confronting us today. Much of this stems from a general lack of understanding of how government works and distrust of the very institution that was established to ensure public good."<sup>16</sup> To combat this challenge and take up the charge to use history to reinforce the function of government and the role of citizens in a democracy, the History Relevance Campaign recommended that executive branch leaders adopt as solutions the following:

- Use public history professionals to provide narratives that show how communities in the state have faced and addressed similar issues in the past.<sup>17</sup>
- Use and promote history as a context for informing current challenges and influence public decision making.<sup>18</sup>

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the past to support finding clearer answers to complex problems, planning, forecasting, and decision-making as it relates to the issues, challenges, and trends of today.

<sup>14</sup> History Relevance Campaign, "Value of History Statement Action for Governor," August 1, 2016. Director's Files, Janet L. Gallimore, Idaho State Historical Society.

<sup>15</sup> History Relevance Campaign, "Value of History Statement Action for Governor," 2.

<sup>16</sup> History Relevance Campaign, "Value of History Statement Action for Governor," 2.

<sup>17</sup> Although the Action for Governor's document is less than ten years old, some of the recommendation language is beginning to show age. For example, research conducted by Susie Wilkening of Wilkening Consulting, presented at the first annual Common Cause to All Summit at Colonial Williamsburg in March 2023, as part of Virginia's America250 commemoration underscored the challenges associated with the word narrative, and how the public "prefers to learn without being force-fed." Her research suggested that sections of the public may associate the term narrative with forced opinions about the past, instead of facts or information, which is what the public seeks from museums and other historical institutions. For a similar presentation to that delivered at the Common Cause to All Summit, see, Susie Wilkening, "Americans, Our History, and the 250th" (Virtual Presentation, Connecticut, May 5, 2023), <https://www.youtube.com/watch?v=gsy69jqOFA>.

<sup>18</sup> Wilkening, "Americans, Our History, and the 250th."

While additional outreach through the National Governor's Association or individual states' executive branches would hopefully provide insight into this document's reach nationwide, I can attest that these recommendations manifested in Idaho roughly four years after this document circulated at the National Governor's Association. These recommendations became part of Governor Brad Little's COVID-19 response in Idaho.

In 2020, the ISHS maximized its position as an expert in developing historical context and analysis by launching a briefing paper program within the Office of the State Historian to provide contextual policy assistance services to Idaho's executive branch of government.<sup>19</sup> The briefing paper model reflects a highly researched historical analysis developed quickly and intentionally to inform policy. In developing the briefing paper program to amplify the connections to the past and to bring relevance to a current moment, this new program also reinforces the strategic ways that the ISHS provides support, historical perspective, context, and tangible deliverables for our governor and policymakers.

Governor Little first inquired about Idaho's response to the 1918 Spanish influenza pandemic in July 2020, only three months after the first lab-confirmed case of COVID-19 arrived in Idaho on March 13, 2020. As the pandemic unfolded, scholars and historians in Idaho began providing context for the public in newspapers and online channels or in public history projects to draw correlations between historical health crises, especially the Spanish influenza, and the emerging COVID pandemic.<sup>20</sup> When Governor Little approached the ISHS requesting context on the state's historic response to the Spanish Flu, I understood the urgency to complete the project efficiently and effectively. Throughout the pandemic, Governor Little incorporated as many different perspectives and resources into his decision-making as possible, including the historical perspective. However, completing a literature review for this project confirmed that I needed to conduct thorough archival research in the government records housed at the Idaho State Archives to craft a historical analysis that answered his direct

19 The History Relevance Campaign invited Steinhauer to a meeting in Philadelphia in August 2019, where he provided an overview of his work as Director at the Lepage Center for History in the Public Interest at Villanova University. One of his activities at that time was creating history briefing papers for corporate clients. In the fall of 2019, Director Janet Gallimore talked with Steinhauer's about the success of his briefing papers. She believed that the executive branch would welcome such a program and that it would bring measurable value to state government. Following these conversations, Director Gallimore engaged with Governor Little's chief of staff, Zach Hauge, about the general concept of the briefing paper program and how it would be a valuable concept for ISHS to explore, given our historical resources and highly credentialed staff. Steinhauer operates at the intersection of history, tech, social media, and politics. Over the summer of 2023, he taught an inaugural course at Syracuse University's Maxwell School of Citizenship and Public Affairs on the impacts of history on policy, titled "A Usable Past: Policymakers and the Lessons of History."

20 Tara A. Rowe, "Pocatello and the 1918 'Spanish' Flu," *Idaho State Journal*, April 12, 2020; Kevin Marsh, "Influenza in Idaho: How the World's Deadliest Pandemic Shaped the Gem State," June 1, 2020.

question: what was Idaho's state-level response during the Spanish influenza pandemic?<sup>21</sup>

Launching into my archival reconnaissance for this project amid a global pandemic would make developing and contextualizing this paper especially challenging. I knew I needed to establish a historical context for the question at hand, meaning I needed to explain the things surrounding Idaho's Spanish influenza response through time and space in a way that gave it meaning today. Under Idaho's phased COVID-19 reopening plan, "Idaho Rebounds," individuals deemed essential, including government employees, retained the flexibility to work on site.<sup>22</sup> My employment granted me access to the collections housed at the Idaho State Archives, which I recognize was a privilege many other historians and researchers did not have during the pandemic. However, I did not have access to materials at other archival facilities across the state because of COVID-19-related closures. Nevertheless, while practicing abundant caution to protect myself and my colleagues from the spread of COVID-19, over roughly eight weeks I worked efficiently and expeditiously to become an expert on the topic using the resources available to me as an "essential employee" of the State of Idaho.

When considering "content creation" for this project, I thought very deliberately about my audience and considered the length of my final product, which was just shy of thirty pages, including endnotes. I needed to be clear, concise, and highly organized in my delivery. Because I anticipated the governor sharing the piece with members of his advisory committees and public health leaders, I organized my paper not in a fully chronological flow but rather in chronological subsections because I wanted the governor to be able to pick up chapters or sections of this piece as stand-alone products. For example, I included a section specifically on the development of state infrastructure and the emergence of county health districts from 1907 to 1972. Another section dealt with the 1921 legislative session and the post-pandemic legislative actions. This approach was intentional, given my audience.

I delivered the final briefing paper to Governor Little on September 1, 2020, to inform policy and public health decisions, highlight our agency's collections, expertise, and ability to use the past as a tool to make decisions that would impact the future immediately and long term, and to provide understanding and articulation of the problems that needed to be solved within the current pandemic vis-a-vis the past. He quickly circulated it amongst his staff. The deep and thoughtful analysis placed Idaho's public health history within a regional and national context that explored Idaho's preventative and curative response to the disease. This perspective provided an important lens for the governor, his staff, members of COVID-19 working groups, committees, and task forces, and others, including the Director

21 Relevant collections included Records of the State Board of Health, the Department of Health and Welfare, and records of various aid organizations, including the Red Cross.

22 The State of Idaho devised the "Idaho Rebounds" Plan with input from state public health officials, advisory group members, and guidance from the White House's Opening Up America Plan.

of the Idaho Department of Health and Welfare, to understand the implications of the decisions they faced during the early phases of the COVID-19 pandemic, and those decisions that would have longer-term implications for the state and its residents.

While the accompanying briefing paper provides the historical context, I will here discuss the research methodology, organizational tools, and analytical approach in more detail. Trained historians generally follow a similar approach to conducting research, analyzing source materials, and compiling that information into a draft manuscript or article. However, in my experience, following a slightly more prescribed process and incorporating certain project and citation management tools, including Microsoft Planner and Zotero, ensured that I completed the research phases with agility, built a body of work complete with document summaries about my topic through iterative and systematic steps, and produced a searchable and trackable research library to create the requested deliverable at the urgent request of Idaho's governor.

The research and project management methodology I employed to deliver ISHS's first briefing paper mirrors the approach I have deployed for all research questions and agency projects I have engaged with since I joined the ISHS in 2019. Key to the success of my approach are repeatable steps, an understanding and appreciation that research at its core should be iterative,<sup>23</sup> and a project management philosophy aligned with Agile Project Management Methods.<sup>24</sup> While traditional project management typically looks at a project lifecycle as a linear, cascading journey, Agile Project Management instead "expects and manages change, rather than preventing it," and "embraces new ideas as the project progresses," essentially integrating planning with execution.<sup>25</sup>

I used Microsoft Planner (in Kanban view) to organize a division of tasks into short phases of work, and I incorporated frequent reassessment and adaptation of the research phases specifically. My original archival reconnaissance plan served as the foundation for my Microsoft Planner Kanban Board, as I used the archival collections and the archival repositories that housed said collections as part of the

23 I define iterative research as the ability to adjust subsequent phases of research according to what I learned or uncovered in previous phases. Within this approach, my knowledge of Idaho's public health history on day one became my baseline, and as I worked through my reconnaissance plan and gathered more information, I could ask better questions about the source information I was compiling; this also opened additional avenues for research.

24 Morgan M. Stoddard, Bill Gillis, and Peter Cohn, "Agile Project Management in Libraries: Creating Collaborative, Resilient, Responsive Organizations," *Journal of Library Administration* 59, no. 5 (July 2019): 495–96. The original Agile Manifesto, drafted by software developers in 2011, emphasized four components of agile project management: prioritize people and good communication, build a working product, collaborate with customers, and adapt to change. These original components now exist as part of a twelve-part framework and include elements such as iterative work, self-organizing teams, reflection, and trust.

25 Cyndi Shein, Hannah E. Robinson, and Hana Gutierrez, "Agility in the Archives: Translating Agile Methods to Archival Project Management," *RBM: A Journal of Rare Books, Manuscripts, and Cultural Heritage* 19, no. 2 (November 7, 2018).

framework for building out tasks, and estimating timelines based on volume and type of materials to review. Managing the project with some degree of adaptability ensured that I completed my tasks quickly, anticipated opportunities for collaboration with the staff of the Idaho State Archives, and minimized time planning and maximized time researching and writing.

The individual tasks outlined in my project plan focused on completing research in a methodical, process-driven, and systematic manner. Included in these tasks were simple steps, such as narrating the contents of boxes and folders touched—even if I did not capture folder-level information my Zotero library and create a digital research copy of the items housed within as a named, numbered, and reproduced “source.” Because I incorporated this and other repeatable steps into all my research projects, I have developed muscle memory for some monotonous tasks, making them easier to tackle. It also meant I worked faster and became more efficient without jeopardizing quality. Lastly, because I incorporated tools, including Zotero, which created a central hub for source and citation management and made any research project more collaborative, the process was also highly trackable.<sup>26</sup> The trackability factor is what I believe makes the practice of historical research more aligned with scientific inquiry, as others, in theory, should be able to follow (or even reproduce or re-create) research to better understand the argument. However, the trackability factor is most important for one’s own work, for it is imperative that historians can retrace their research, especially when layering various iterations of research questions, literature reviews, and archival reconnaissance plans together as the foundation for a thoughtfully crafted historical analysis.

As I developed my research questions for this project, I also needed to clearly understand the project timeline and parameters. The initial request from Governor’s Little’s Office stressed the urgency of this project but recognized that since this was the first briefing paper I was undertaking, and that I was writing a historical context and developing proof of concept at the same time, his office did not set a strict deadline on the project. In working with my director, I prioritized this project above everything that was on my then-annual work plan. I set an initial two-month timeline for the project, began planning and setting my archival reconnaissance efforts in motion in collaboration with the Idaho State Archives reference team, and identified the highly relevant materials housed at the Idaho State Archives and other digital collections. I estimated that the first iteration of research and document review would take three or four weeks, at which point I would

<sup>26</sup> Although other citation management software and tools such as Scrivener or Nota Bene exist for academics and scholars to manage writing and citation management, my preference for utilizing Zotero stems from its zero cost (unless you need to pay for online storage for attachments), its open-source code, its compatibility with Microsoft, and its online browser widget, Zotero Connector. ISHS subscribes to Microsoft Suite of products and my approach to integrating Zotero for citation and source management, with OneDrive for file storage meets my current needs and that of my agency.

begin to compile the summary documents and preliminary analyses I drafted along the way into a first draft of the briefing paper. I hoped to have a completed draft within seven weeks, leaving an additional week to complete additional research if needed and revisions on the draft briefing paper. Confirming my project timeline, milestones, anticipated project length, and medium—for example, did I need to incorporate graphs or charts to display statistical or empirical data—was essential for success, as I did not anticipate having time on the backend of the project to adjust the final deliverable given the urgency of the ask.

My archival reconnaissance identified key collections at the Idaho State Archives, including AR 84, Records of the State Board of Health, MS633, American Red Cross—Boise Chapter, and AR73, Department of Health and Welfare. However, after reviewing these materials, I realized I needed to fill major gaps in the information available from these sources, which is where records of the Idaho Board of Education and other education-related materials proved especially helpful. For example, while the State Board of Health records did not mention additional policy actions past the initial arrival of the pandemic in October 1918, the Board of Education records confirmed additional actions that the Board of Health took post-October 1918, and the actions that universities and other educational institutions took to actualize those rules and regulations.

In addition to seeking sources that provided qualitative data, I also incorporated quantitative data, such as statistical information such as death rates as well as infection and recovery rates, among others where appropriate. The American Historical Association (AHA) reiterated in a 2016 series in their publication *Perspectives on History* the importance of a public historian's diversified skill set, including quantitative literacy. Scholars Nicholas Mulder and Madeline Woker defined quantitative literacy as “a basic ability to understand and communicate information presented in quantitative form.”<sup>27</sup> I needed to break down numbers as part of my historical analysis and think critically about incorporating such data into my final paper. The challenges I faced when incorporating these resources stemmed from the known challenges doctors and nurses faced when capturing this data at the time. Reporting was complex. Other written records from that era said as much. I was hesitant to include incomplete or conflicting data and given this reality, I tried to find multiple sources to corroborate the numbers, when possible, to ensure historical accuracy. In some instances, newspaper research served to corroborate what I found in official records of state boards and entities and other statistical sources.

Despite all the sources I consulted that were relevant and critical to developing the arguments presented within the briefing paper, I also identified and reviewed materials that ended up not being useful or relevant for this project. However, I did

27 “Quantitative Literacy | AHA,” <https://www.historians.org/jobs-and-professional-development/career-resources/five-skills/quantitative-literacy>; “Who’s Afraid of Numbers? | Perspectives on History | AHA,” <https://www.historians.org/research-and-publications/perspectives-on-history/may-2016/quantitative-literacy-for-historians-whos-afraid-of-numbers>.

not want to question whether I had reviewed a collection or a box because I did not think it was relevant at the time of review, so I took note of *everything I reviewed*. By drafting a quick summary of what I physically touched in my Zotero library and whether I expected the materials to be relevant in the final paper, I created a route back to all materials, even those I may have passed on during the first phase of research. My process, with its systems and elements, ensured that I was able to develop the paper from a robust foundation of archival materials in less than my two-month project timeline and deliver it to the governor's office quickly enough for the content therein to remain relevant to the policy questions at hand. I collected over 150 individual sources for my project and examined over twenty archival boxes, published sources, digital newspapers, and government reports. I cited nearly fifty individual documents in my final briefing paper. The most valuable sources I used in my papers included biennial reports of the Board of Education and the Records of the Red Cross. The Board of Health materials, which I expected to be critical to the project, only provided the outline of my work, not the meat of the story.

Given the multi-year progression of the COVID-19 pandemic, the interest in the public health history in Idaho proved to have a longer lifespan than the timeline for the governor's briefing paper, and my research methodology and source tracking system proved useful for future and aligned projects and interviews post-briefing paper delivery. One of the sources I captured in July 2020 was a newspaper article about vaccinations. It read in part, "every outbreak, every epidemic of this disease starts among the ignorant part of the population. Either the subjects stricken with [the disease] didn't know of the importance of being vaccinated, or they have been misinformed and led to believe vaccination was unnecessary or even dangerous."<sup>28</sup> Although this piece reads like it could have been a contemporary source questioning vaccination, the *Idaho Statesman* published it as part of an article titled "Health Talks" by Dr. William Brady in 1924, in which he argued for the use of inoculation for smallpox.

I did not end up using this piece in my briefing paper, but I did an interview about vaccinations for the *Idaho Statesman* in May 2021. In talking with the reporter, I compared this story to a column printed just a few years earlier in 1919—a public forum opinion piece on the "public despotism" for mandating vaccinations for school-aged children, which claimed that half of the medical profession denounced vaccination for smallpox not only because it was "useless" for preventing the disease, but also because it propagated other diseases including syphilis, tuberculosis, cancer, and other incurable diseases.<sup>29</sup> This anecdote reinforces the importance of building and maintaining trackable (and searchable) bodies of research. I did not know that I would have an opportunity to come back to the issue of public health so soon after completing my briefing paper for Governor

28 "Health Talks by William Brady, M.D.," *Idaho Statesman*, December 16, 1924.

29 "Public Forum: The Vaccination Infamy," *Idaho Evening Times*, September 3, 1919.

Little; however, because I built a searchable, trackable research library for the project about Idaho's response to the Spanish Flu, it was easy to pick this research back up almost a year later to continue to dig into the records of the Department of Public Health to learn more about Idaho's polio vaccine crisis to be prepared for this interview. All my research notes resided in Zotero; my sources were readily available. It was as if no time had passed. And given the nature of projects that cross my desk as Idaho State Historian, it is becoming clearer that the use of a multi-functional, digital database for citation and source management should be explored as a baseline model or best practice for any professionals working in an environment where projects have a tendency to arise and change, and where the general topic of one's work remains somewhat contained, as in the case of my work, where I have a vested interest in all things Idaho history. Topics researched this year may very well inform projects in the immediate and longer-range future.

In further exploring Idaho's vaccination history, as an iteration on the research I started under the briefing paper project, I learned that Idaho received shipments of live poliovirus vaccine in April 1955. After administering several thousand doses, the state reported several cases of vaccine-induced polio. The faulty vaccines caused twenty-eight cases of vaccine-induced polio and sixty-nine cases of polio from association with victims who had received the faulty vaccines. Following this incident, the state health department halted all vaccinations for months, and because of this tragic episode, the federal Public Health Service implemented new safety test standards for all polio vaccines manufactured in the US. Nevertheless, even after these federal measures were taken, Idaho still tested all its polio vaccines with an independent third-party to ensure the safety of the vaccines.<sup>30</sup> In 1956, the state built its first virus laboratory in Boise, the predecessor laboratory to the one that first confirmed the arrival of COVID-19 in the Gem State on March 13, 2020.

The immediate impact of the Spanish influenza briefing paper influenced public policy and public health decisions that Governor Little, Director Dave Jeppesen of the Idaho Department of Health and Welfare, and other members of the COVID-19 response teams had to make. Decision-making was especially challenging during this early phase of the pandemic because these leaders still had little information about this novel coronavirus and its behavior. Director Jeppesen, having served in his position since 2019, chaired the Governor's Coronavirus Advisory Committee along with the state epidemiologist, Dr. Christine Hahn. He reported that the briefing paper gave him primary public health input for policy decisions. He commented that all who read the paper remarked on how well it was done, how insightful it was to what happened during the 1918 influenza pandemic, including policy decisions, and how eerily similar the 1918 influenza pandemic and the subsequent response from Idaho was to the COVID-19 pandemic experience. This

<sup>30</sup> "Idaho State Board of Health, Biennial Report, 1954-1956" (Boise, Idaho, December 31, 1956), 7, Open Stacks, Idaho State Archives.



last point made the paper extremely relevant to real-time policy and public health decisions.

My briefing paper provided important historical context and analysis that informed the state's decisions and gave the state's leader the necessary perspective on Idaho's public health infrastructure and challenges. The timing of the paper's delivery ensured that state leaders had at the ready information from which to make macro-level decisions about implementing and then exiting statewide stay-at-home orders and micro-level decisions about how the logistics regarding individual patients who needed to be transferred to a hospital location that had the capacity to treat them could be orchestrated. Leaders of the state's COVID-19 hospital systems and the Idaho Department of Health and Welfare noted that some of state's most difficult decisions were about entering into crisis standards of care or about figuring out what to do when demand for medical resources would exceed the available supply. These decisions always involved input from many perspectives and were all difficult to make. The state's leaders had evidence via the briefing paper that it was not the first time in state history that such incidents occurred.

At one point in 1918, many medical workers had influenza and could not work, and medical supplies were in short supply due to WWI. Idaho faced the same situation with the COVID-19 pandemic, and one of our hospitals closed for a week when over 60 percent of the staff had COVID-19. Since Idaho employed a "just-in-time" medical supply chain model, things like personal protective equipment were in short supply. The briefing paper illustrated that historically, when faced with such challenges, the call went out for help, and that is exactly what our state leaders replicated, tapping into the Medical Reserve Corps and other volunteers. The state and its hospitals asked for donations of things such as gowns and masks for medical workers, and just like in 1918, the public responded to help the medical professionals and their neighbors in their time of need.

The briefing paper provided a perspective highlighting how others had gone through a remarkably similar situation and that, in that instance, there were, historically, many opinions about the then-current event. I illuminated that many people in 1918 had opinions about whether schools should remain open, whether wearing masks should be required, and whether things that brought large groups of people together should be discontinued to slow the spread of the disease. The paper comforted the state's key decision-makers that they were not the first to face this situation and challenging decisions.

The briefing paper described how the state's current public health system emerged over decades after the 1918 influenza pandemic. Using this knowledge to guide them, Governor Little and Director Jeppesen have begun to wrestle with what the public health infrastructure of the future should be, what the future needs are of the users of the state's system, and anticipated changes to the system itself. In 1918, capturing simple data, such as case numbers, was next to impossible. While

the Department of Health and Welfare struggled initially to capture and share data during the COVID-19 pandemic, like all public health agencies across the country and the world, it eventually developed a robust data system to monitor key indicators such as number of cases, testing positivity rates, and hospital utilization. However, the briefing paper clarified to our state leaders that they needed to take what they had learned to improve for the future. For example, should the federal policy change to broaden the number of reportable diseases?

Additionally, my exploration of Idaho's response to the 1918 pandemic highlighted a series of preventative measures that mirrored proposals from health experts that came before the Department of Health and Welfare. My research uncovered that, throughout the 1918 pandemic, Idaho struggled with a shortage of healthcare workers. Such a shortage has persisted and has been exacerbated by the COVID-19 pandemic. Expanding our state's healthcare workforce is one of the governor's biggest priorities moving forward. Knowing this has been a challenge in Idaho for at least a century provided Governor Little with additional motivation to focus on the ongoing need.

The briefing paper's last and perhaps more significant impact made it clear to our state leaders that to save as many lives as possible, decisive statewide action needed to be taken, and taking those actions would cause some people to react negatively. Nevertheless, despite those reactions, the right decision was to move to save as many lives as possible. This insight helped those charged with making those difficult decisions. For example, my analysis of the development of our state's public health system reminded the governor and other key decision-makers of how our localized public health districts were intended to function and of the importance of preserving decision-making at the local level.

Although the impacts on the state's public health and policy decisions were tangible and immediate, the briefing paper also laid the foundation for another COVID-19-inspired project that will have lasting impacts for many, including future researchers. In February 2021, as part of a relaunch and reimagining of the ISHS's oral history program, I devised a multi-phase oral history project designed to capture the pandemic-related experiences of individuals and state leaders across Idaho who were instrumental in our state's pandemic response. Using TheirStory<sup>®</sup> Oral History Software, contractor and intern support, I have captured the experiences of the COVID-19 pandemic in Idaho "through the lived experience of a wide range of working people and community leaders and how it impacted our everyday structures, such as church and family."<sup>31</sup> The interviews with state leaders, including Director Jeppesen, and other state agency heads, such as the directors of the Idaho Department of Labor, the Idaho Office of Emergency Management, the Division of Financial Management, and the Idaho Commission on Aging, will serve as an additional reference for future decision-makers in our state and researchers across the globe.

31 Angie Davis, "Saving History, Making History," *Mountain Light* 58, no. 1 (March 1, 2023): 9.

The process of launching a new program during a one-in-a-generation public health crisis has taught me many lessons. I am most grateful for the tremendous availability of online source material and the continued push by archivists and librarians to make that material available. Resources, including the Internet Archive, HathiTrust, the Library of Congress, and Newsbank, helped make this briefing paper possible. The confines of shuttered archives and closed repositories forced me to think more critically about the source material I used and follow breadcrumbs I might not otherwise have followed. For example, considering that public health was my topic, I might not have immediately seen the value and importance of education records for this project had other avenues, including federal repositories, not been closed. I am also extremely proud to have served as a public servant and an essential worker during this pandemic in providing our governor with a detailed and highly researched historical analysis. I am also pleased to know that his office understands the value of such historical context in informing our shared understanding of the past and that such understanding can inform current issues.

The long-term implications of the briefing paper program within my office and what it means for the state government are only beginning to be realized. The concept of understanding audience and tailoring a final deliverable to the audience's needs and wants is critical and deserving of more attention in the field, even if that deliverable is something other than a briefing paper. Do due diligence on the front end and solicit information about how the end user will put the final product to use as you conceptualize its length, design, format, layout, and even approach (i.e., thematic or chronological flow). Work towards establishing a "minimum viable product," which may be a twenty-page paper instead of a more verbose fifty-page paper.<sup>32</sup> I am keeping this perspective focused as I develop a second briefing paper for Governor Little on the impacts of legislative redistricting and apportionment in Idaho state history.

An additional takeaway from this project and proposed best practice that I implore others to consider in developing their workflow is incorporating and refining multi-functional research databases. Such a tool could serve one or more users and help produce a wide range of historical knowledge projects for an agency or organization. The Zotero libraries that I have built since assuming the role of State Historian have become the foundation for my work, but I also see additional opportunities to expand this research model deeper within the fabric of the ISHS to bolster efficiency, collaboration, and, most importantly, long-term planning and professional development among staff. A historian's work can be solitary, but with

<sup>32</sup> Steve Blank, "Why the Lean Start-Up Changes Everything," *Harvard Business Review*, May 1, 2013. A minimum viable product is a term used in entrepreneurship as part of lean startup methodology whereby a startup develops a product or service that fits the basic needs of the market or consumer to test the company's viability. Developing a minimum viable product and bringing it to market is a shift away from traditional business plans. It eliminates "wasted time and resources by developing the product iteratively and incrementally."

tools such as this and sufficient foresight and agile planning to engage with colleagues across divisions, departments, and chains of command, I see numerous opportunities for enhancing our work products as an organization and better-utilizing everyone’s research acumen to develop a deeper understanding about the past.

The development of the briefing paper program within the Office of the State Historian will also, over time, emerge as a reminder to the executive branch that our agency forms the institutional memory of state government. Despite the topics that I, or future state historians, may tackle as part of this program, the heart of the work—the historical research and analysis—shows what these work products can do for an institution to remind it why it made decisions in the past and why unmaking them today *may* be a mistake. This program, or others that may form at other institutions because of this Report from the Field, reminds our elected officials and the general public that agencies like ours matter to state government, and this, perhaps more than anything, speaks to historians’ essentiality in the twenty-first century. Intentionally providing historical context to Idaho’s executive branch to inform public policy decisions can only strengthen the concept of historical relevancy for our agency and the field, and I am excited to be a leader in this space.

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