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Partnerships with Public Institutions: Reflecting on Applied History and Social Justice Principles

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Abstract: This article emphasizes that social justice – as both a process and a goal – should be put forward as guiding principle for applied historians who want to engage in partnerships with public institutions. While ethical issues are intrinsically intertwined with addressing contemporary problems and facilitating social change, I argue that reflective and reflexive questioning before, during and after a partnership with institutions in power can bring ethical responsibility to the applied history field. The principles of reflection and reflexivity align with social justice by creating greater transparency in both the actions of applied historians, as well as in the actions of the advised institutions.

Keywords: social justice; applied history; reflection; transparency; ethics

The concept of social justice seems to be increasingly on the lips of many public historians, particularly among those who see it as their task to act responsively towards current issues and to foster change. Although some practitioners would argue that public historians have always been concerned with dismantling injustices, the efforts to take action rather than to simply debate or study injustices have received more and more attention over the last few years.¹ In this regard, Maria Georgiou and Bassel Akar stated in the 2022 issue on History and Justice in *Public History Weekly* that “historians have furthered arguments favoring the moral responsibility of directing historical discourse towards addressing social justice.”²

Especially in the United States there is a strong focus on radical public history, which Denise Meringolo defined as a practice that is “future-focused, committed to the advancement of social justice, and engaged in the creation of a more

inclusive material record.”³ The initial occasion that prompted social justice and activism to become a claimed core value of the profession in the United States was a working group session at the 2014 annual meeting of the National Council on Public History (NCPH). In particular, the shift from civic engagement to social justice and activism was discussed here.⁴ A year later at the conference of the American Historical Association, many attendees also raised questions regarding the historian’s role in relation to social justice.⁵ It has been a central theme in the United States ever since and has now come to influence debate in Europe as well. At the 2022 conference of the International Federation for Public History in Berlin, for example, questions were raised whether public history is necessarily activist. This discussion on activism continued in Vienna during the *Public History Weekly* conference on “Political Activism in and through Public History” in September 2023. Scholarly activism has thus become inherent to public history as more and more academics leverage their research to confront significant societal challenges, including issues like inequality and exclusion.

Yet, the act of using historical knowledge and skills to facilitate social justice is almost exclusively driven from a bottom-up perspective. As community-oriented practitioners, public historians see it as their responsibility to ensure that excluded groups have ownership of their own history and identities. By engaging with minority groups and making them actors of historical production, they want to enable more inclusive and diverse representations of the past. Co-creation and shared authority have therefore become important social justice tenets within the public history field.⁶ These elements of civic engagement

1 G. V. G. K. Tang, “We need to talk about public history’s columbusing problem,” *History@Work*, June 25, 2020, <https://ncph.org/history-at-work/we-need-to-talk-about-public-historys-columbusing-problem/>.

2 Maria K. Georgiou and Bassel Akar, “History and Justice: Dialogues from the Eastern Mediterranean,” *Public History Weekly* 10, no. 5 (2022). doi: <https://doi.org/10.1515/phw-2022-20120>.

3 Denise D. Meringolo, introduction to *Radical Roots: Public History and a Tradition of Social Justice Activism* (Amherst: Amherst College Press, 2021), 2.

4 Thomas Cauvin, *Public History: A Textbook of Practice* (New York: Routledge, 2016), 230.

5 Shatha Almutawa, “The Historian and Social Justice,” *Perspectives on History* 53, no. 2 (2015). <https://www.historians.org/research-and-publications/perspectives-on-history/february-2015/the-historian-and-social-justice>.

6 Barbara Franco, “Decentralizing Culture: Public History and Communities,” in *The Oxford Handbook of Public History*, eds. James B. Gardner and Paula Hamilton (New York: Oxford University Press, 2017), 69–86, 79–80.

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have especially been used as strategies for addressing issues of injustice and inequality.⁷ The effort to connect history to the promotion of social justice, in this regard, is predominantly situated within the cultural sphere. Jorma Kalela states that “trained historians serve as cultural critics who act simultaneously as consultants on history-making and as referees in the usage of the past.”⁸ As such, the body of literature focuses particularly on domains like oral history, museum studies, preservation, and history education – not coincidentally, these are the four research groups of the *Radical Roots* research project – to mobilize public history practices for the purpose of promoting social justice.⁹

In the last few years, however, the notion of applied history has seen a notable rise in interest among historians who want to engage with those in power in order to address contemporary problems and issues such as political extremism, COVID-19, and climate change, as well as minor and more individual challenges.¹⁰ Although it is often seen as part of public history, applied historians specifically work “from above” as they seek to influence the world of policymaking and political decision-making in an effort to resolve societal debates and create impact at scale. The case that historians should consider government a vital domain for historical practice has already been set out by Alix Green. In her 2016 book *History, Policy and Public Purpose: Historians and Historical Thinking in Government*, she argues that scholars have the wider responsibility to contribute to processes of debate and decisions-making, even if politics cannot fully reconcile a diversity of interests, commitments, and priorities.¹¹ As role models that shape the norms and values of society, public institutions in particular play a crucial role in the development and implementation of social justice efforts and should therefore be considered more often by historians as potential partners. Research has already shown that their legitimacy is important for building trustful and

inclusive societies.¹² Without institutional trust, the principles of justice could not be upheld.¹³

Besides, the creation of a more just and trustworthy society often entails institutional change within existing public institutions, a process whereby historians can play a crucial role.¹⁴ As noted by Roy Suddaby and William M. Foster, “history actually offers a valuable but underexploited organizational resource that can be used to motivate and successfully manage change.”¹⁵ Change efforts actually often reflect a response to shifting social conditions or a new form of need among stakeholders or groups ‘from below.’¹⁶ This means that, in practice, both top-down – engaging in partnerships with institutions in power – and bottom-up – relating to issues of civil nature and often associated with excluded groups – approaches are necessary to foster positive change, encourage social justice, and address contemporary problems. Such approaches are also closely linked together and complementary.¹⁷ Ironically, though, while applied historians are seeking ways to take on more active roles to address social issues, these top-down initiatives are often *a priori* excluded; are in many ways being criticized as unjust; and are often subject to suspicion. This is especially the case in Europe where partnerships with government institutions are less established than in the United States. As

7 Denise D. Meringolo, “Conclusion: The Uneasy Relationship between Civic Engagement and Social Justice,” in *Radical Roots*, 612.

8 Jorma Kalela, “History Making: The Historian as Consultant,” *Public History Review* 20, no. 1 (2013): 24–41, 26.

9 Meringolo, *Radical Roots*, 4.

10 Bram De Ridder, “‘And what Do You Do, Exactly?’ Comparing Contemporary Definitions and Practices of Applied History,” *International Public History* 5, no. 1 (2022): 29–41, 29 and 40.

11 Alix R. Green, *History, Policy and Public Purpose: Historians and Historical Thinking in Government* (London: Palgrave Macmillan, 2016), 4.

12 Jonathan Perry, “Trust in public institutions: Trends and implications for economic security,” Report United Nations Department of Economic and Social Affairs, July 2021, https://www.un.org/development/desa/dspd/wp-content/uploads/sites/22/2021/08/PB_108.pdf.

13 Nada Berrada, “Reflecting on Trust and Social Justice in the thought of David Hume and John Rawls,” Virginia Tech Institute for Policy and Governance, September 21, 2018, <https://ipg.vt.edu/DirectorsCorner/reflections-and-explorations/Reflections092118.html>.

14 Michael Reisch and Charles D. Garvin, *Social Work and Social Justice: Concepts, Challenges, and Strategies* (New York: Oxford University Press, 2016), 19.

15 Roy Suddaby and William M. Foster, “History and Organizational Change,” *The Journal of Management* 43, no. 1 (2017): 19–38, 35.

16 Reisch and Garvin, *Social Work and Social Justice*, 222.

17 I would like to refer to this quote from Jonathon Rowson on the importance of both top-down and bottom-up approaches: “For starters, there is nothing inherently wrong with ‘top-down’. There’s a time and place for authority, hierarchy and regulation, usually to resolve intractable debates or create impact at scale, but it needs to be democratized and contained with suitable checks and balances. And there is nothing inherently right about ‘bottom-up’, because while there is also a time and place for context, specificity, granularity, and the passion that comes from particular people fighting for particular purposes in particular places, there is a limit to what you can achieve without the major levers or economic and political power.” See: Jonathon Rowson, “Top down, bottom up, side to side, inside out: 4 types of social change and why we need them all,” the RSA, April 2014, <https://www.thersa.org/blog/2014/04/top-down-bottom-up-side-to-side-inside-out-4-types-of-social-change-and-why-we-need-them-all>.

a consequence, there has been little sustained effort to examine the relation between social justice and applied history. This article seeks to fill that gap.

Throughout this text, social justice is both perceived as an ideal guideline of practical and ethical standards for historians who advise existing powers, as well as an ambition to implement measures of a “just nature” in the advised public institutions. The aim is therefore twofold. First, I will discuss the need to redefine the role of historical consultants who want to engage in partnerships with public institutions. I will consider both the factors that have discredited such top-down initiatives, as well as the recent attempts to incorporate social justice principles in the actions of applied historians. The importance of the latter idea is explained by Michael Reisch and Charles D. Garvin in their well-acclaimed book entitled *Social Work and Social Justice: Concepts, Challenges, and Strategies*, where they state that “socially just ends cannot be realized and sustained unless they are achieved through socially just means.”¹⁸ This will result in the proposition to move from a more negative association of applied historians as ‘teachers of evil’ – referring to the early modern philosopher-statesman Niccolò Machiavelli, who is best known for his political treatise *Il Principe*. Rather, this article will work towards a role that takes reflective and reflexive methods into account like ‘devil advocates,’ and propose some guiding principles to attain and sustain a socially just process and goals. In a blog for the Dutch professional organization of historians, Bram De Ridder already stated that “without reliable method, no reliable applied history.”¹⁹

Secondly, by introducing a guiding ideal based on socially just principles for engaging in a partnership with public institutions, I also want to elaborate on the question of how applied historians can contribute to the advancement of social justice in these institutions. This does not mean that historical consultants should force the advised institutions to adopt goals that express social justice.²⁰ Nor is it about determining what might constitute an (un)just action, since that is often a matter of conviction, and many conflicting dimensions and ideological perspectives coalesce in such discussions.²¹ Rather, the promise lies in providing public institutions with reflective and reflexive modes of thinking, insights, and ways to build trust and transparency into

public life. In particular, I am interested in questioning how history can be applied in public communication, since social justice exemplifies the need for a strong trust relation between the advised institutions and their stakeholders.²² As argued in the 2021 *OECD Report on Public Communication*: “Public communication that is transparent, respectful of the values of honesty, integrity and impartiality, and conceived as a means for two-way engagement with citizens can lead to greater trust.”²³

1 From Teacher of Evil ...

Historians who apply history across a variety of policy-making settings are often held accountable for selling their soul to the devil.²⁴ Extreme forms of applied history in the past, aversion and mistrust in society towards public institutions, and skepticism towards presentism and elitism within the academic profession have put the notion of applied history into a precarious position.²⁵ As a result, the recent attempts to put applied history into practice and to think creatively about how policymakers and public institutions can be better involved is regularly overshadowed by criticism of an epistemological and moral nature.²⁶

22 Shuwei Zhang and Jie Zhou, “Social Justice and Public Cooperation Intention: Mediating Role of Political Trust and Moderating Effect of Outcome Dependence,” *Frontiers in Psychology* 9, no. 1381 (2018): 1–16, 2.

23 OECD Report on Public Communication: The Global Context and the Way Forward, (Paris: OECD Publishing, 2021).

24 Gill Bennett, “Practices of Applied History: Questions, Answers, Discussions” (statement made during the 3rd Corvus Applied History Workshop, KU Leuven, May 11, 2022).

25 Especially European historians have addressed mistrust in applied history: see, for example. “Why did applied history, once as good as an axiom of the subject, fall out of favour?” in Jacob Forward, “The Return of Applied History,” *On History*, November 2022, <https://blog.history.ac.uk/2022/11/the-return-of-applied-history/>; “In recent decades, however, things have changed. The longstanding view of the historian as being, in modern jargon, ‘policy-relevant’, has fallen out of favour and often arouses suspicion” in Robert Crowcroft, “The Case for Applied History,” *History Today* 68, no. 9 (2018): <https://www.historytoday.com/archive/feature/case-applied-history/>; “Applied history has generally been regarded by the historical profession as suspect and inferior” in John Tosh, “In Defence of Applied History: the History and Policy Website,” *History and Policy*, February 2006, <https://www.historyandpolicy.org/policy-papers/papers/in-defence-of-applied-history-the-history-and-policy-website>.

26 Paul Reef, “Dossier Toegepaste Geschiedenis – Verslag webinar OPG: het nut en gebruik van applied history,” *Historici.nl: het Koninklijk Nederlands Historisch Genootschap*, October 2, 2020, <https://www.historici.nl/dossier-toegepaste-geschiedenis-verslag-webinar-opg-het-nut-en-gebruik-van-applied-history/?type>.

18 Reisch and Garvin, *Social Work and Social Justice*, vii.

19 Bram De Ridder, “Dossier Toegepaste Geschiedenis – Van manifesten naar manifesteren,” *Historici.nl: het Koninklijk Nederlands Historisch Genootschap*, June 5, 2020, <https://www.historici.nl/dossier-toegepaste-geschiedenis-van-manifesten-naar-manifesteren/?type=bijdrage>.

20 Reisch and Garvin, *Social Work and Social Justice*, 102.

21 Green, *History, Policy and Public Purpose*, 3.

Discussions about the application of historical thinking to shed light on current issues and to suggest courses of action have a long history.²⁷ Applied historians often trace their origin back to Thucydides, who imagined his *History of the Peloponnesian War* as a warning for future statesmen. To further claim relevance to the field, proponents of applied history often refer – not surprisingly – to other historical figures to show that the engagement of historians in policy related fields has been a well-established practice through history from ancient to current times. Different names pass in review: among them are Roman historian Livy, who introduced the idea that the past provided a reservoir of exemplary behavior for statesmen aligned with a cyclical perception of time, John Robert Seeley, a Victorian historian who is known for the conception of history as the ‘school of statesmanship,’ and US historian Benjamin Franklin Shambaugh, who coined the term ‘applied history’ at the beginning of the twentieth century to actively encourage the use of historical knowledge, insights, and perspectives amongst policymakers.²⁸ The methods of the early practitioners can now easily be criticized as abuses of the past, since they do not correspond to the moral standards we set in today’s Zeitgeist. For instance, Cicero’s *historia magistra vitae* (life’s teacher) expression, which conveys the idea that the study of the past should serve as a lesson to the future, proved particularly susceptible to manipulation by political authorities and their ideologies. As another notorious example, Machiavelli, who used the past to provide a manual for statecraft in the present, was even referred to by political philosopher Leo Strauss in the 1950s as “a teacher of evil” due to the ends justifies the means approach he promoted in *The Prince*.²⁹

In this regard, the skeptics also rely on past examples to show that applied history has in time taken extreme forms. They often refer to more recent examples especially drawn from the “Age of Extremes,” as described by Eric Hobsbawm, such as historians advising the Third Reich and CIA to underline how easily history can be instrumentalized.³⁰ According to Green, “the uses and abuses of history in the twentieth century – including the justification of war, genocide and terror – have given historians a particular set of problems in its dealings with political elites.”³¹ Claims to

historical legitimacy played a pre-eminent role, and misgivings about the risks of placing history in the service of the state became more prominent.³² In line with this, Margaret MacMillan warns in her work *The Uses and Abuses of History* that those who abuse history by creating one-sided or false history to justify unreasonable and unjust claims should be distrusted. However, she argues that history is valuable when it is used to understand the underlying thoughts and behaviors of social actors.³³ These examples show that history can be a powerful tool. Hobsbawm, for instance, remarked: “I used to think that the profession of history, unlike that of, say, nuclear physics, could at least do no harm. Now I know it can.”³⁴

With the institutionalization of public history from the 1970s onwards, the term and practice of applied history was further being challenged and upended.³⁵ According to a recent intervention by Petros Apostolopoulos, a transition took place from “public historians who practiced history and worked for governments, historical societies, and archives between the mid-19th and the mid-20th centuries, to public historians who wanted to create a shared authority with the public and communicate history to a broader audience.”³⁶ Especially in Europe, bottom-up approaches, social history, and history from below came to dominate the field and created the framework of discussion. To give an example, at an oral history meeting held in Oxford in 1987 Donald A. Ritchie remarked that “in England you were more likely to be interviewed [by historians] if you were a fisherman than a Member of Parliament.”³⁷ The distancing from top-down approaches by history professionals was possibly strengthened by the rising levels of distrust in public institutions in the West since the 1970s.

In 2006 John Tosh wrote in his defense of applied history that “applied history does not stand in good odor with the historical profession.”³⁸ Till today, associating the role of teacher of evil with historians who deal with institutions

27 For a more detailed historiographical overview, see Harm Kaal and Jelle van Lottum, “Applied History Past, Present, and Future,” *Journal of Applied History* 3, no. 1–2 (2021): 135–154.

28 *Ibid.*

29 Leo Strauss, *Thoughts on Machiavelli* (Glencoe, Illinois: The Free Press, 1958), 10.

30 Eric Hobsbawm, *Age of Extremes: The Short Twentieth Century, 1914–1991* (London: Abacus, 1995).

31 Green, *History, Policy and Public Purpose*, 3.

32 Martin Sabrow, “The Use of History to Legitimize Political Power: The Case of Germany,” in *Politics of the Past: The Use and Abuse of History*, ed. Hannes Swoboda and Jan Marinus Wiersma (The Socialist Group in the European Parliament, 2009), 97–105, 97.

33 Margaret MacMillan, *The Uses and Abuses of History* (London: Profile Books Ltd, 2009): xiii, 153.

34 Quoted in Swoboda and Wiersma, *Politics of the Past*, 17.

35 Petros Apostolopoulos, “What is the Public of Public History? Between the Public Sphere and Public Agency,” *Magazén* 2, no. 2 (2021): 311–328, 315.

36 *Ibid.*, 318.

37 Donald A. Ritchie, “Top Down/Bottom Up: Using Oral History to Re-Examine Government Institutions,” *Oral History* 42, no. 1 (2014): 47–58, 49.

38 Tosh, “In Defence of Applied History.”

in power indicates the uncertainty of a large group of university-based historians on whether historical knowledge and skills should be used to tackle policy related issues.³⁹ In a profession that generally views presentism as a sin rather than a virtue, it is still relatively rare to hear of historians taking more direct roles in policy issues while maintaining good standing within academia.⁴⁰ As a result, current discussions on the topic of applied history – especially in Europe – are often taking a philosophical and moral course, where discussants are lingering on questions of whether historians should even be presentists and advisors at all. Regardless of the persistent differences of opinion about this, the plea for more social integration has already been made in manifestos of many historians. And as mentioned earlier, the advisory role of historians in policy-related fields is not a new one. The overall challenge for applied historians is therefore to move beyond the question if historians should engage in partnerships with public institutions, since the use of history in policymaking settings is already an established point of reference, and to start focusing more on describing, elaborating, and sharing processes, practicalities, and methodologies for how this should be done in an ethical and socially just way.

2 Towards Devil's Advocate

On this impetus, historians could still use their expertise of advancing arguments by implementing this skill in public institutions as a consultancy strategy. This core value of the history profession finds a lot of connection with the role of devil's advocate, which has been defined by Charles R. Schwenk as “a procedure which involves the appointment of one or more persons to raise objections to favored alternatives, challenge assumptions underlying them, and possibly point out alternatives.”⁴¹ The effectiveness of using the devil's advocacy approach to facilitate better information processing, change management, and impact decision-making has already received substantial support in

literature on organizational studies, for example, as an antidote to group or institutional thinking.⁴² Historians in particular could be well suited to take up such a role in being debaters for the sake of good (not bad or evil). When side-stepping the caricature illustration of devil's advocates as solely being contrarians and complainers, this role allows to draw on other historical skills, among which are critical thinking, challenging assumptions, making sense of change, reducing uncertainty by relying on precedents, identifying issues that otherwise might be overlooked or ignored by studying how institutions use the past, provoking debate, examining failure paths, and encouraging the development of alternatives.

Adding to this, the most valuable characteristic of taking up the role of devil's advocate is possibly reflective and reflexive questioning against conceived or present wisdom, which again lies at the heart of the history profession. Meringolo, for example, already pointed out that “radical public history requires radical self-reflection.”⁴³ Besides, Reisch and Garvin argue that both reflection and reflexivity serve as principles which underlie socially just practice. They describe reflection as an “ongoing review and critique of one's actions, interactions, processes, progress, and social contexts to learn and deepen one's understanding and sense of options,” meanwhile reflexivity, according to them, “requires us to view ourselves in relation to our practice, along with all our social roles and related identities, historical contexts, and assumptions.”⁴⁴ The main role of the historical consultant, in this regard, is not to tell their partners what to do; rather, the promise lies in making them think and opening up options by creating a process of reflection and reflexivity.⁴⁵ In this sense, devil's advocates do not bring out the bad – as the name might suggest – instead, they provide partners with unconventional wisdom that initiates a thinking process.

In line with this, Green previously raised the idea of “thinking with history in policy,” suggesting that historians should focus less on briefing and informing policymakers and more on bringing distinctive modes of thinking and reasoning into the policymaking process.⁴⁶ Moreover, Harm Kaal and Jelle van Lottum dedicated the *Journal of Applied History* to the notion of historical thinking, which they deem as an “essential element of discussion about the challenges

³⁹ Anita Boele, Arjan van Dixhoorn, and Pepijn Van Houwelingen, “Vroeger voor vandaag. Heden-verledenvergelijkingen voor praktisch gebruik,” *Beleid en Maatschappij* 43, no. 3 (2015): 224–243, 225.

⁴⁰ James H. Sweet, “Is History History? Identity Politics and Teleologies of the Present,” *Perspectives on History* 60, no. 6 (2022): <https://www.historians.org/publications-and-directories/perspectives-on-history/september-2022/is-history-history-identity-politics-and-teleologies-of-the-present>.

⁴¹ Charles R. Schwenk, “Devil's Advocacy in Managerial Decision-Making,” *Journal of Management Studies* 21, no. 2 (1984): 153–168, 158.

⁴² Fred C. Lunenburg, “Devil's Advocacy and Dialectical Inquiry: Antidotes to Groupthink,” *International Journal of Scholarly Academic and Intellectual Diversity* 14, no. 1 (2012): 1–9, 5.

⁴³ Meringolo, *Radical Roots*, 3.

⁴⁴ Reisch and Garvin, *Social Work and Social Justice*, 107.

⁴⁵ Virginia Berridge, “Why Policy Needs History (and Historians),” *Health Economics, Policy and Law* 13, no. 3–4 (2018): 369–381, 378.

⁴⁶ Green, *History, Policy and Public Purpose*, 37.

that our societies are now confronted with.”⁴⁷ According to them, historical thinking involves first and foremost a keen eye for context. The distance created in a historical perspective makes it possible to objectify contemporary developments, which according to Kaal and van Lottum, “conditions us to recognize complexity, ambiguity, and uncertainty, as opposed to embarking on a quest for closure, reductionism, and finality.”⁴⁸ Historical thinking can therefore serve to question underlying assumptions that appear self-evident in the present time by shedding light on striking features, struggles, and challenges that confront our contemporary societies.⁴⁹

Offering reflective and reflexive modes of historical thinking especially matches the demand of European policymakers. In her study on policy-oriented history for the European Union, Marie-Gabrielle Verbergt stated that the policy demand for historical research has increased in the two most recent European Union Research Framework Programs.⁵⁰ Contributions to an understanding of Europe’s intellectual basis and work that stimulate “reflective societies” have in particular been described as an important societal need. Also, reflexivity is often mentioned as a core European value in calls for state-ordained historical research. Verbergt pointed out that the demand for reflexivity became more prominent from 2014 onwards and mostly relates to questions about “identity,” “memory,” and the “public sphere.”⁵¹ She added that “EU policy-makers like to think of themselves as open to other value- and truth-orientations, and are eager to critically investigate their own assumptions.”⁵² This varies from the context in the United States with its greater reliance on the law court to decide policy. As described by Virginia Berridge, US historians have taken more direct roles as policy-advisors for longer.⁵³ As ‘expert witnesses’ they have used history for advocacy by taking one side or another in lawsuits.⁵⁴ This approach can be a powerful force for change as it seeks to address issues directly; however, it confirms the present stance rather than seeks to question or understand it. The plea to bring more reflective and reflexive modes of thinking in the engagement

of historians with public institutions is therefore more in line with the European perspective. Instead of pressing institutions to implement policies that will address injustice, the devil’s advocacy approach promotes reflectivity and reflexivity in order to address social justice and build trust and transparency into public life. The further development of applied history should therefore be aimed at raising questions, rather than confirming the status quo.⁵⁵

3 Values-Based Applied History

In order to move towards a values-based applied history, a guiding ideal is set out below with particular attention to how social justice can be understood as relevant for the actions of historical consultants and their partners. Social justice is put forward as a value-rational ideal underlying an ethical, moral, and philosophical basis for bringing historical advice into practice.⁵⁶ As a practice that concerns itself with addressing social issues and facilitating change, it must incorporate sufficient attention to the means and processes behind it. By adding social justice principles into the larger consideration of applied history, engagement in partnerships with public institutions will become more ethical responsible. I present reflectivity and reflexivity as core values of this framework. These principles align with social justice action by creating greater transparency in both the actions of applied historians and of the advised institutions.

The reflect-in-action and reflect-on-action approaches, as formulated by Donald Schön, are therefore at the basis of the framework below. As suggested by its name, reflection-in-action occurs during the process to keep means and ends, thinking and doing, all in focus at the same time. As the conditions that produce social justice are often complex and changing, and as applied research calls for an innovative response tailored to the unique circumstances of the institution in question, it requires applied historians to engage in ongoing reflection and critical thinking to attain and sustain socially just means and goals.⁵⁷ Reflection-on-action occurs

47 Harm Kaal and Jelle van Lottum, “Editorial,” *Journal of Applied History* 1, no. 1 (2019): 1–3.

48 *Ibid.*, 1.

49 *Ibid.*

50 Marie-Gabrielle Verbergt, “Policy-Oriented History for the EU: The Rise of New Type of Professional Practice for Historians?,” in *Professional Historians in Public: Old and New Roles Revisited*, eds. Berber Bevernage and Lutz Raphael (Berlin: De Gruyter, 2023), 185–212, 186.

51 *Ibid.*, 195–196.

52 *Ibid.*

53 Berridge, “Why Policy Needs History (and Historians),” 378.

54 *Ibid.*

55 Bert de Munck, “Dossier Toegepaste Geschiedenis – De coronacrisis als uitdaging voor maatschappijkritische historici,” *Historici.nl: het Koninklijk Nederlands Historisch Genootschap*, May 28, 2020, <https://www.historici.nl/dossier-toegepaste-geschiedenis-de-coronacrisis-als-uitdaging-voor-maatschappijkritische-historici/?type=bijdrage>.

56 Martin Wiklund, “The Ideal of Justice and Its Significance for Historians as Engaged Intellectuals,” in *The Engaged Historian: Perspectives on Intersection of Politics, Activism and the Historical Profession*, ed. Stefan Berger (New York: Books, 2018) 44–62, 45.

57 Reisch and Garvin, *Social Work and Social Justice*, 2; Noel J. Stowe, “Public History Curriculum: Illustrating Reflective Practice,” *The Public Historian* 28, no. 1 (2006): 39–65, 49.

Values-based Applied History Model

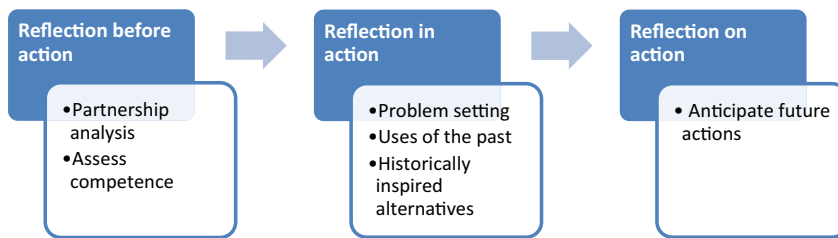


Figure 1: Guiding ideal based on socially just principles for applied history.

afterwards in order to evaluate the actions and outcomes. It is a form of explicit knowledge that allows stakeholders to learn from experience and plan for future improvement. With the applied history field expanding its theoretical frameworks, methods, and tools, there will be continuously new ethical challenges to consider. The addition of a category of reflection before-action helps to review a potential collaborative partnership, understand, and evaluate what is being asked, to think about the skills needed to succeed, and to anticipate on what challenges can occur during a consultancy assignment. It is especially in this phase that questions about positionality, advocacy, and power relations are addressed. The sub-themes and the reflective and reflexive questions that go with each category are intended as inspirational guiding principles, drawn from literature and my own experiences with advising public institutions, and are not limits nor rooted principles for applied history (Figure 1).⁵⁸

4 Reflection Before Action

4.1 Partnership Analysis

Why advise public institutions that already enjoy power and platforms? Why would historical consultants engage in partnerships with privileged groups who are often distrusted or considered immoral? Does a partnership with public institutions not merely help them to stay in power while legitimizing their ideology? Much criticism towards applied historians is targeted at the collaborative relationships they engage in. At the NCPH panel *Activating the Past: Reflections and Perspectives on Applied History as Means to Address Societal Challenges*, Green stated that applied historians should make their own judgements as to whether a potential collaborative partnership, with governments and businesses among others, are in line with their core values

⁵⁸ My own experiences are based on research I conducted for three (semi)governmental institutions in Belgium, namely: the Flemish Parliament, the Flemish Environment Agency, and the Royal Federation of Belgian Notaries.

and commitments. Such a requirement does not just ask about the reputation or status of the institution in question but, more importantly, has a reflexive character that asks: what can I achieve in this engagement, to whom, in what specific way, and to what end? What will I be advocating for? And why can a commitment toward a particular public institution be understood as a commitment to justice?

Exclusion of institutions as potential partners, in this sense, should not depend too much on their image or position of power, although another interesting reflexive question would be why historical consultants feel more comfortable in some settings than in others. Rather, the decision to engage in a partnership should depend on the questioning, receptivity, and the impact that such partnership can effectuate. Applied historians therefore have no obligation to say “yes” to any consultancy assignment, even if it comes from a client who allows the historian to keep to professional history standards. However, engaging in partnerships with institutions that do not share the same values and beliefs can be very enriching for both parties, as this creates a situation where a devil’s advocacy approach can flourish. The added values of this understanding will be illustrated on the basis of two assumptions.

First of all, everyone deserves access to accurate and reliable historical interpretations. When historians engage with institutions in power they have opportunities – or even responsibilities – to challenge their assumptions, initiate a dialogue about privilege, power, and their uses of the past, and consequently offer them alternatives and more ethical options to work with if necessary. In a blog from WGA Consulting on ethics in the consulting industry it is also recognized that consulting firms have the obligation to demonstrate to clients that ethical behavior can lead to success for the institution, its employees, its stakeholders, and society as whole.⁵⁹ In his 2013 book *Why Study History?: Reflecting on the Importance of the Past*, John Fea argues that historians have the skill to develop empathy, even with

⁵⁹ “Ethics in the Consulting Industry: Reality or Illusion?” WGA Consulting, January 7, 2016, <https://www.wgaconsulting.com/new/2016/01/07/ethics-in-the-consulting-industry-reality-or-illusion/>.

characters that might be considered immoral.⁶⁰ According to him, this skill is required in civil society, because without it people become divided. In this view, historians make excellent mediators to build community among people who have different beliefs, backgrounds, and inclinations.⁶¹

This brings me to the second assumption, namely that applied historians must contribute to broader causes in their engagement with a specific institution in power. While consultants are primarily responsible for creating value and safeguarding the interests of their partners, they also have an additional responsibility to the public by pursuing their goals in an ethical manner as well as to align the interests of their clients with the general good.⁶² On this impetus, Martin Wiklund argues that collaborating with a certain group can be justified if that particular group in question is understood as the embodiment of a general interest, like public institutions.⁶³ This implies that the partner is subject to specific public service obligations and poses therefore also such responsibilities on the consultant. This idea is well described in the WGA Consulting blog:

They have an obligation to recognize that there are multiple stakeholders, customers, employees, society and the environment, not just shareholders and management. They should act with the utmost integrity, and serve the greater good, with an enhanced sense of joint accountability. It is vital to realize that their actions have profound consequences for everyone, inside and outside the organization, now and in the long run. Consulting companies, should focus more on ethical guidance, as they hold significant influence over many companies' strategy and plans.⁶⁴

Both assumptions indicate a broader responsibility for applied historians, namely to actively think about questions such as: how can social justice and inclusivity be promoted and achieved through a partnership with public institutions? And how can public institutions better connect with citizens to strengthen their trust relationship? In this way, the historical consultant not only contributes to the issues and questions of their direct partners but can also seize the opportunity to fulfill a greater social role as mediators between public institutions and their stakeholders. Bridging the trust gap will be beneficial for the purpose of social justice.

⁶⁰ John Fea, *Why Study History?: Reflecting on the Importance of the Past* (Michigan: Baker Academic, 2013).

⁶¹ Almutawa, "The Historian and Social Justice."

⁶² "Ethics in the Consulting Industry."

⁶³ Wiklund, "The Ideal of Justice," 54.

⁶⁴ "Ethics in the Consulting Industry."

4.2 Assess Competence

The second step requires careful consideration of whether applied historians have adequate competence to justify their roles and engagements. How can applied historians be at the service of a cause while maintaining research ethics? What are the duties of historians to their partners, and more broadly to the public? And how can applied historians find a balance between confidentiality towards partners, scientific obligations, and transparency towards the general public? Engaging in a partnership with public institutions raises questions about the role, the authority, and the expertise of historical consultants.⁶⁵ Dealing with partners while meeting scholarly standards of the profession can be challenging, especially since each of these spheres comes with their own methods, techniques, and ethical principles.⁶⁶ Every engagement with a new partner therefore requires an understanding of each other's values, motives, objectives, and constraints. Codes and debates about ethics play a significant role in this matter according to Thomas Cauvin, who argued that they "cannot prevent historians from being wrong, but can prevent them from being unethical."⁶⁷

When sounding out the expectations and objectives of a potential collaborative partnership, the historical consultant should make their partner aware of the 'certain uncertainty' that typifies applied history. Historically inspired advice consists of different levels of certainty, preventing historical consultants to be conclusive or deliver truths, which can be considered an advantage in playing devil's advocate. According to Noel J. Stowe, the goal of a historical intervention therefore cannot be to find 'the answer' to the problem but should rather be about identifying a range of approaches that will yield concrete results.⁶⁸ In this regard, Laura King and Gary Rivett also pointed out that "it is often the process of engagement that is inherently most valuable to those we engage with – the conversations, debates and exchanges of skills and ideas rather than the final impact or change."⁶⁹ The emphasis on process management and providing insights as ways of impact, rather than conclusive advice, might pose difficulties in setting objectives with the partners,

⁶⁵ Thomas Cauvin described these challenges to the broader field of public history in Cauvin, *Public History: A Textbook of Practice*, 216.

⁶⁶ The 2007 NCPH Code of Ethics and Professional Conduct distinguishes four categories of responsibilities public historians have, namely to clients and employers, to the public, to the profession, and self-responsibility.

⁶⁷ Cauvin, *Public History: A Textbook of Practice*, 21.

⁶⁸ Stowe, "Public History Curriculum," 51.

⁶⁹ Laura King and Gary Rivett, "Engaging People in Making History," *History Workshop Journal* 80, no. 1 (2015): 218–233, 229.

including: how can we make partners aware of the benefits of applied history for their organization/institution, when a conclusive outcome cannot be guaranteed? Can measurable criteria be created so that partners can evaluate the effectiveness of the intervention by historical consultants? Dialogue and transparency are important to address these issues. Every step of the potential partnership must be studied, discussed, agreed upon, and put on paper before action is taken in order to set achievable goals and avoid the risk of being instrumentalized for political purposes.

5 Reflection in Action

5.1 Problem Setting

Applied historians who want to take it a step further by engaging in a partnership with a particular institution should move to the reflection-in-action stage. Actions create real-world outcomes, and historical consultants should therefore deliberate about actions in relation to their ends.⁷⁰ It is especially in this interaction that action and ethical practice meet. Problem setting and reflecting on outcomes, in this sense, are intrinsically linked. Reisch and Garvin stated that “socially just practice requires visioning how the achievement of the purposes of a specific service can make contribution to a more just world.”⁷¹ Despite the fact that consultants have no full control of concrete outcomes, since their partners decide how to use their advice, it is important that they have a say in what issues need to be addressed and how to formulate them. Reflecting on the following questions can offer guidance in terms of problem setting: who benefits from the way the problem is currently defined?⁷² Who gains or loses if the problem is reduced or eliminated or if it is redefined? Would different framings of a problem promote different actions?⁷³

Identifying issues is the first step to real progress. Einstein, for example, wrote that “the formulation of the problem is often more essential than its solution.”⁷⁴ Schön also noted that “the essential difficulties in social policy have more to do with problem setting than with problem solving, more to do with ways in which we frame the purposes to be

achieved than with the selection of optimal means for achieving them.”⁷⁵ At the Nijmegen Workshop *What Applied History is (Not)*, Dolly Verhoeven and Wim Meurs, Dutch historians with experience in history on demand and advising in a think tank, argued that clients are often unable to formulate the ‘right’ questions. Analyzing the broader context and helping institutions with problem setting, by using the devil’s advocacy approach of incisive questioning for example, is a quality that applied historians can bring to the table.

5.2 Uses of the Past

Are the partners aware of their own historical reasoning, and do they consciously use the past to achieve their goals? Do these conscious and unconscious applications reflect the most recurring flaws of the public use of history, and do they contain risks for the organization? Are the partners relying on stereotypes or other preconceptions based on preexisting beliefs that may oppress their stakeholders or limit the development of their own power and change process? These questions reflect the belief that socially just practice requires applied historians to gain insight into how their partners understand, make sense of, engage with, as well as use and consume, history. In the role of devil’s advocate, the uses-of-the-past approach can function to point out risks and flaws, identify hidden assumptions, and make unseen problems, injustices, and moral wrongs visible. This approach exposes a broader commitment that Wiklund describes as “the justice or justness of historical judgements and interpretations.”⁷⁶ That means applied history should be motivated by values that lead historical consultants to challenge exclusionary or limited narratives, encourage institutions to challenge stereotypes, explain to them the complexity of the past and the possibilities of narrative strategies, and provide advice on how to include more inclusive and diverse representation of the past. Adding to this list, Cauvin argues that “the challenge for historians who work in national institutions is to question any celebration of the past, any forgetting of the dark aspects, while also taking into consideration the variety of public demands.”⁷⁷

On this note, the uses of the past by public institutions should especially be examined in terms of their

⁷⁰ Stowe, “Public History Curriculum,” 51.

⁷¹ Reisch and Garvin, *Social Work and Social Justice*, 104.

⁷² *Ibid.*, 105.

⁷³ Paul Thibodeau, “Set to Solve: How Emphasizing Problem Setting can Solve Problems in Washington,” *Behavioral Scientist*, August 22, 2013, <https://behavioralscientist.org/set-to-solve-how-emphasizing-problem-setting-can-solve-problems-in-washington/>.

⁷⁴ Quoted in *ibid.*

⁷⁵ Donald Schön, “Generative Metaphor: A Perspective on Problem-Setting in Social Policy,” in *Metaphor and Thought*, ed. Andrew Ortony (Cambridge: Cambridge University Press, 1993), 137–163, 138.

⁷⁶ Wiklund, “The Ideal of Justice,” 57.

⁷⁷ Cauvin, *Public History: A Textbook of Practice*, 220.

communication patterns, since it often functions as a medium where their commitments to social justice are expressed. It is a primary vehicle through which citizens can learn about government action and comply with its indications. Advising institutions on how to be transparent, responsive, open, fair, and engaged with their stakeholders could therefore be considered valuable in terms of bridging a potential trust gap and advancing social justice.⁷⁸ To narrow the trust gap, Charles Andrain and James Smith explained that policymakers need to reward citizens with benefits, both expressive (moral-spiritual-ideological) values – like justice – and instrumental goods.⁷⁹ In line with the former, trust can be regarded as a means of communication that allows conducting social and cultural dialogue – in which history plays a significant role – between public institutions and their stakeholders.⁸⁰ This view stems from the aftermath of the Cultural Turn, which brought about a concentration on culture, identity, and voice (the discourse of recognition) at the expense of socio-economic factors (the discourse of redistribution) when making claims for social justice and trust.⁸¹

The promise of a historical perspective is therefore not to address how public institutions can regain trust, nor is it about legitimizing the position of partners without acknowledging the potential impact on their stakeholders/society – as often implicated by sceptics. Rather, it lies in supporting public institutions on how to make sense of change related to trust issues, since well-known and stable identities, relations, and narratives become unstable during times of uncertainty.⁸² By studying the communication efforts of partners through their uses of the past and narratives, historical consultants can provide institutions with insights on their course of action, help them envision alternative futures, and, most importantly, take up the role of mediators of social and historical inspired dialogue to bring their partners and stakeholders closer.

⁷⁸ OECD Report on Public Communication.

⁷⁹ Charles F. Andrain and James Thomas Smith, *Political Democracy, Trust, and Social Justice: A Comparative Overview* (Boston: Northeastern University Press, 2006), 2.

⁸⁰ Irina Glushko, Irina Lavrukina, and Andrey Polomoshnov, “Trust/Distrust as Factor of Constructing Social Reality,” *Journal of Legal, Ethical and Regulatory Issues* 21, no. 1 (2018): 1–9, 6.

⁸¹ Nancy Fraser, “Social Justice in the Age of Identity Politics: Redistribution, Recognition, and Participation” (Paper presented at the Wissenschaftszentrum Berlin für Sozialforschung, Berlin, December, 1998); Karin Zotzmann and Gregorio Hernández-Zamora, “Beyond the ‘Cultural Turn’: The Politics of Recognition versus the Politics of Redistribution in the Field of Intercultural Communication,” *The Language Learning Journal* 41, no. 3 (2013): 357–369, 357.

⁸² Per H. Hansen, “Copenhagen Business School (CBS) Interview with Sebastian Alvarez,” *The University of Oxford*, May, 2019, <https://upier.web.ox.ac.uk/article/interview-h-hansen>.

5.3 Historically Inspired Alternatives

The role of devil’s advocate, which is characterized by providing and opening other valuable perspectives, thinking about comparable scenarios that refute original claims, and posing alternative explanations to clarify issues, becomes probably most effective in regard to the more common methods linked to applied history, such as historical analogies, periodization, contextualization, and counterfactual history.⁸³ The past, as David Thelen puts it, “is a reservoir of alternatives to the present: by recovering things from the past or by looking at experience differently we can see how to think and act differently in the future.”⁸⁴ Thinking out of the box not only generates ideas, above all it creates new outcomes, provides unique insights, and enables partners to reflect and make decisions about how they want to move forward.

Producing alternative interpretations, however, entails accountability and transparency. Historians must therefore justify their choices and decisions in a way that is open to discussion and evaluation, by both academic scholars and – even more important – by the societal partners as they make the final judgements about the value of the advice that is given. This implies that, on the one hand, alternatives should meet scholarly standards but risks over-contextualization, which could lead to inapplicability. On the other hand, they must be comprehensible and be made so that they can easily be adopted by non-historians, which risks under-contextualization. Reflection, again, is crucial. The following questions can guide historical consultants on this matter: Which alternative policy options can be deduced from historical precedents, and what are the advantages and disadvantages of such alternatives? And will the alternatives offered have consequences in normative terms? Diversification in offering advice is key to prevent historical claims from being conclusive. To be effective, historical consultants should challenge dichotomous ways of thinking, because this could lead to unjust constructions of power.

⁸³ Bram De Ridder, “And What Do You Do, Exactly?,” 37.

⁸⁴ David Thelen, “A Participatory Historical Culture,” in *The Presence of the Past: Popular Uses of History in American Life*, ed. Roy Rosenzweig and David Thelen (New York: Columbia University Press, 1998), 190–208, 205.

6 Reflection on Action

6.1 Anticipate Future Actions

Assuming responsibility for one's actions is the final step in this model, as even the most sincere visions to do good and to act justly can become clouded by blind spots. Applied historians must therefore also hold themselves to a process of checks and balances after action, by including full transparency about their involvement. Reflection-on-action is not only important in terms of accountability but also for the future development of the applied history field. Describing processes and sharing experiences could enable a comprehensive view on what applied history is supposed to entail, especially in terms of attaining and sustaining socially just goals and facilitating change. This means reflecting on the following questions, among which are: how did you carry out the consultancy? Which methods were used, how, and in what circumstances did they function well? What challenges did you encounter, and consequently how did you respond? When looking back, would you have done anything differently?

Bram De Ridder recently stated that “few history and policy initiatives have, however, offered clear methodological guidelines to other applied historians, nor have they intricately addressed the ethical conundrums associated with advising (and thus influencing) concrete policy choices.”⁸⁵ According to him, the combination of academic with non-academic ambition put a limit on methodological openness due to the competitive advantage over other consultants claiming to use history.⁸⁶ This implies that there is still a lot of work to bring transparency into the field. On the other hand, the process of a two-way engagement with non-academics is also valuable in terms of academic output. The partners could serve as research informants, whose input and expertise can be used to shape research questions on topics such as trust in public institutions, organizational

change management, history in public communication, and social justice.

7 Conclusion

This article has argued that social justice – as both a process and a goal – should be put forward as a guiding principle for historical consultants who want to engage in partnerships with public institutions in its most ethical way. Although ethical issues are intrinsically linked to applied history, reflective and reflexive questioning before, during, and after a partnership enables ethics and deontology to the practice by creating transparency. In this regard, ethical arguments ought not to be used as a means to reject the engagement of historians in partnerships with institutions in power, nor as a way of portraying applied historians as teachers of evil. Instead, it should be understood as a responsibility that historical consultants need to be mindful of in all of their professional activities. This does not mean that ethical concerns should not be expressed; rather, I suggest that these concerns should be deployed in an applicable and productive way to optimize and further develop the practice. In this regard, the overall challenge for applied historians is to move beyond the question of if the past can be applied in policy-related fields and to start focus more on describing, elaborating, and sharing processes, practicalities, and methodologies for how this should be done. The values-based applied history framework that is built on socially just principles like reflectivity and reflexivity offers an attempt to create a common point of reference for historical consultants in what engagement in partnerships with public institutions is supposed to entail. Even more, it offers insights on the question of how applied historians can become social justice advocates.

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⁸⁵ De Ridder, “And What Do You Do, Exactly?” 38.

⁸⁶ Ibid.