



PROGRAM OVERVIEW

The Arizona Historical Society (AHS) Certified Historical Institution (CHI) Program is designed to support historical museums and organizations across the state of Arizona in their efforts to collect, preserve and share Arizona's rich history. This program is open to brick-and-mortar facilities, as well as to historical organizations who fulfill certain requirements related to the preservation and sharing of Arizona history.

CHIs demonstrate efforts to follow and apply standards or "best practices" established by the American Association for State and Local History (AASLH) and the American Alliance of Museums (AAM). While some organizations are restricted in their ability to meet some of these guidelines, AHS seeks to support those who recognize the importance of the standards and who demonstrate a desire to adhere to them within the constraints of their individual circumstance.

AHS provides support to CHIs with access to industry professionals, networking and educational materials. CHIs are eligible for grants up to \$2,000 per year. Beginning in 2020, AHS will host a CHI Symposium, designed to provide members with additional educational and networking opportunities.

In 2020, AHS is pleased to expand the CHI program to provide an option for smaller historical organizations to become certified. The 2020 CHI program now provides for two levels of certification; Tier 1 and Tier 2.

Tier 1 organizations must be open to the public, and/or offer educational programming aligned with the organization's mission a minimum of **416 hours per year**. Tier 2 organizations must be open to the public, and/or offer educational programming aligned with the organization's mission a minimum

of **108 hours per year**. This requirement can be met through a combination of museum hours and public programming, or solely on public programming. Tier 2 certification expands the program to organizations that previously did not qualify for certification, particularly those without brick-and-mortar facilities. Tier 1 CHIs are eligible for an annual grant of up to **\$2,000**, while Tier 2 CHIs are eligible for an annual grant of up to **\$1,000**.

The 2020 program also includes the addition of an Institutional membership. This membership is designed for historical organizations and museums, schools, libraries and other institutions. It includes a subscription to the Journal of Arizona History. **Membership at the Institutional level or above is required for certification.** To become a member at the Institutional Membership level or above, visit azhs.org/membership.

Historical museums and organizations must apply for certification during the application window. In 2020, applications will be accepted beginning February 3 through February 29. Certification is valid for one year. Application for renewal is also during the same window. To apply, complete the Application form located on the AHS website. See the How to Apply section for more information.

BENEFITS

Tier 1 and Tier 2 CHIs have equal access to educational materials, networking opportunities, and promotion on the AHS website, and are invited to attend the CHI Symposium planned for later in 2020. In addition, Tier 1 CHIs are eligible for a grant up to \$2,000 annually, and Tier 2 CHIs are eligible for a grant up to \$1,000 annually.

For more information and to apply for a grant, see the Grant Application section.

GUIDELINES

The following guidelines must be met to be considered for approval as an AHS Certified Historical Institution.

CERTIFICATION REQUIREMENTS

REQUIREMENTS FOR CERTIFICATION – TIER 1 AND TIER 2

I. AHS SUPPORT	
a.	Active AHS Member, at Institutional or higher level
II. PUBLIC TRUST AND ACCOUNTABILITY	
a.	The organization complies with local, state and federal laws, codes and regulations applicable to its facilities, operations and administration
b.	The organization is committed to public accountability and is transparent in its mission and its operations
III. MISSION AND PLANNING	
a.	The organization has a clear understanding of its mission and communicates why it exists and who benefits as a result of its efforts.
b.	The organization is guided by a mission statement that clearly describes the purpose of the organization, and a vision statement that clearly describes the organization's future direction.
IV. LEADERSHIP AND ORGANIZATIONAL STRUCTURE	
a.	The organization is a Non-Profit 501c3 or Sovereign Nation
b.	The organization has a governing structure including by-laws, articles of incorporation, and a board of directors/trustees.
c.	The organization conducts meetings and holds elections on a regularly scheduled basis.
d.	The governance, staff and volunteer (as applicable) structures and processes effectively advance the organization's mission.
e.	The organization has volunteers that support the organization.
VI. EDUCATION AND INTERPRETATION	
a.	The organization offers educational and public programs, special events, and other activities tied to its mission
b.	The organization presents accurate, appropriate, and unbiased content for each of its audiences.
c.	The organization provides regular audience engagement that promotes the value of history.
d.	The organization is open to the public, and/or offers educational programming aligned with the organization's mission a minimum of 108 hours per year. (Note: 108 hours is the minimum for Tier 2 certification. See below for Tier 1 requirements.)

VII. FINANCIAL STABILITY

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| a. | The organization legally, ethically and responsibly acquires, manages and allocates its financial resources in a way that advances its mission. |
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VIII. FACILITIES AND RISK MANAGEMENT

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| a. | The organization's facility is clean, well maintained and provides for the visitor's safety and needs. |
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ADDITIONAL REQUIREMENTS FOR TIER 1 CERTIFICATION

II. PUBLIC TRUST AND ACCOUNTABILITY

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| a. | The organization identifies the communities it serves and makes appropriate decisions in how it serves them |
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IV. LEADERSHIP AND ORGANIZATIONAL STRUCTURE

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| a. | The organization has a membership program that supports the organization. |
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V. COLLECTIONS STEWARDSHIP

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| a. | The organization is a collecting institution, and legally, ethically and effectively manages, documents, cares for and uses the collections. |
| b. | Guided by its mission, the organization provides public access to its collections while ensuring their preservation. |
| c. | The organization owns, exhibits or uses collections that are appropriate to its mission |

VI. EDUCATION AND INTERPRETATION

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| a. | The organization is open to the public, and/or offers educational programming aligned with the organization's mission a minimum of 416 hours per year. |
| b. | The organization clearly states its overall educational goals, philosophy and messages, and demonstrates that its activities are in alignment with them. |
| c. | Organizations conducting primary research do so according to scholarly standards. |
| d. | The organization facilitates scholarly research. |

VIII. FACILITIES AND RISK MANAGEMENT

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| a. | The organization allocates its space and uses its facilities to meet the needs of the collections, audience and staff. |
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GLOSSARY OF TERMS

NOT-FOR-PROFIT

To become a not-for-profit organization in the State of Arizona, Articles of Incorporation are filed with the Arizona Corporation Commission (ACC). When approved and registered as a museum or historical organization by the ACC, it can file with the IRS for 501(c)(3) designation. The 501(c)(3) status not only exempts the museum or historical organization from federal income taxes, but permits donors to deduct monetary and in-kind contributions.

GOVERNING STRUCTURE

In the not-for-profit application process, both the State of Arizona and IRS require documents, including Articles of Incorporation and By-laws, which govern the organization. Governing documents define policies and assign responsibilities of board members, staff, and volunteers.

REGULARLY SCHEDULING MEETINGS AND ELECTION OF OFFICERS

The success and vitality of museums and historical institutions depend on regularly scheduled meetings that bring together staff and board members to discuss and assess current operations, activities, and future directions. Election of officers, too, is conducted on a defined schedule, preferably with established term limits (for both officers and board members).

DEVELOPING MEMBERSHIP AND VOLUNTEERS

Members and volunteers are invaluable to the success of most museums and historical institutions. They contribute time as docents, assist curators, provide administrative support, and make monetary donations. They often serve as the conduit linking the museum or historical organization to the community it serves.

OFFERING PUBLIC VISITATION AND PARTICIPATION

AHS certified museums and historical institutions are open to the public an average of at least four hours per week (208 hours annually), with many following a seasonal schedule based on climate and tourism patterns. Public hours are posted at the museum entrance and advertised using signage, flyers, brochures, the internet, and other forms of media. Historical institutions that do not operate a museum facility provide interpretive programs and activities to fulfill certification requirements.

PROMOTING PUBLIC PROGRAMS

AHS certified institutions, museums, and historical organizations promote Arizona history through public programs of various types, including exhibitions, docent tours, classroom presentations, access to collections for researchers, hosting special events, celebrations, and commemorations. Importantly, an organization's public programs relate to its mission statement.

ENCOURAGING PUBLIC AWARENESS FOR ARIZONA HISTORY

In addition to networking with AHS, historical museums and institutions may partner with local governments, businesses, civic and service clubs, schools, and libraries to champion the history of their communities. Many certified institutions take advantage of AHS workshops and seminars, as well as through individual contact with staff to exchange ideas and be of mutual assistance. They may become members of state, regional, or national museum organizations.

ENDORING SOUND COLLECTIONS MANAGEMENT PRACTICES

AHS certified institutions, museums, and historical organizations that collect must have, or be in the process of developing, a collections policy that governs the acquisition, accession, care, and use of objects, documents, oral histories, maps, and photographs (including electronic formats) related to their mission statement. AHS staff is available to assist with collections management.

ENSURING SAFE ENVIRONMENTS FOR STAFF, PUBLIC AND COLLECTIONS

Security measures must exist to protect the museum and its contents from theft and vandalism, while safety precautions are taken to protect staff, volunteers, and the general public in a pleasant environment. In addition, conservation methods are comprehensive and in place to shield collections from detrimental elements including direct sunlight, insects, moisture, or temperature fluctuations.