HIA 0.0

Agency Summary

ARIZONA HISTORICAL SOCIETY

W. James Burns, Executive Director
Administration (480) 387-5366
A.R.S. § 41-821(A)
Plan Contact: William Ponder, Chief Operating Officer
Administration (520) 628-5774

Mission:

To connect people through the power of Arizona's history.

Description:

The Arizona Historical Society is a member- and government-supported nonprofit State agency. It is governed by a Governor-appointed board consisting one representative of each county, one representative of each of five historical organizations, and five appointees at large.

Museums and historic properties are located in Flagstaff, Tempe, Tucson, Yuma, Douglas, and Pine-Strawberry. The Society maintains an extensive library and archival collections used by a diverse audience, and it produces the Journal of Arizona History and various historical books. The Society certifies and supports 73 local historical societies in preserving and disseminating Arizona history. The Society also supports other board-approved community activities.

◆ Goal 1  To create a unified identity for the organization (Internal and External)

Objective: 1 FY2020: Increase public awareness of AHS.
           FY2021: Increase public awareness of AHS.
           FY2022: Increase public awareness of AHS.

◆ Goal 2  To enhance financial resources to advance our mission and ensure long-term sustainability and growth.

Objective: 1 FY2020: Diversify revenue streams to decrease dependence on appropriated funds.
           FY2021: Diversify revenue streams to decrease dependence on appropriated funds.
           FY2022: Diversify revenue streams to decrease dependence on appropriated funds.

◆ Goal 3  To become the most trusted authority on Arizona history.

Objective: 1 FY2020: Increase online presence by adding more collections and publications.
           FY2021: Increase online presence by adding more collections and publications.
           FY2022: Increase online presence by adding more collections and publications.

◆ Goal 4  To improve our ability to collect, preserve, interpret, and disseminate Arizona's history.

Objective: 1 FY2020: Remove items from collections that do not directly relate to mission and items that have low utility.
           FY2021: Remove items from collections that do not directly relate to mission and items that have low utility.
           FY2022: Remove items from collections that do not directly relate to mission and items that have low utility.

◆ Goal 5  To attract audiences by creating transformative experiences through history.

Objective: 1 FY2020: Increase visitation and encourage audience growth using on-site technology.
           FY2021: Increase visitation and encourage audience growth using on-site technology.
           FY2022: Increase visitation and encourage audience growth using on-site technology.
AGENCY SUMMARY

Program: HIA 0.0 ARIZONA HISTORICAL SOCIETY
Director: W. James Burns, Executive Director
Phone: Administration (480) 387-5366
Statute: A.R.S. § 41-821(A)
Plan Contact: William Ponder, Chief Operating Officer
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◆ Goal: 1 To create a unified identity for the organization (Internal and External)

Objectives:
1. 2020 Obj: Increase public awareness of AHS.
2. 2021 Obj: Increase public awareness of AHS.
3. 2022 Obj: Increase public awareness of AHS.

Performance Measures:

<table>
<thead>
<tr>
<th>ML</th>
<th>Budget Type</th>
<th>FY 2019 Actual</th>
<th>FY 2020 Estimate</th>
<th>FY 2020 Actual</th>
<th>FY 2021 Estimate</th>
<th>FY 2022 Estimate</th>
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◆ Goal: 2 To enhance financial resources to advance our mission and ensure long-term sustainability and growth.

Objectives:
1. 2020 Obj: Diversify revenue streams to decrease dependence on appropriated funds.
2. 2021 Obj: Diversify revenue streams to decrease dependence on appropriated funds.
3. 2022 Obj: Diversify revenue streams to decrease dependence on appropriated funds.

Performance Measures:

<table>
<thead>
<tr>
<th>ML</th>
<th>Budget Type</th>
<th>FY 2019 Actual</th>
<th>FY 2020 Estimate</th>
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<th>FY 2021 Estimate</th>
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◆ Goal: 3 To become the most trusted authority on Arizona history.

Objectives:
1. 2020 Obj: Increase online presence by adding more collections and publications.
2. 2021 Obj: Increase online presence by adding more collections and publications.
3. 2022 Obj: Increase online presence by adding more collections and publications.

Performance Measures:

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<thead>
<tr>
<th>ML</th>
<th>Budget Type</th>
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◆ Goal: 4 To improve our ability to collect, preserve, interpret, and disseminate Arizona’s history.

Objectives:
1. 2020 Obj: Remove items from collections that do not directly relate to mission and items that have low utility.
2. 2021 Obj: Remove items from collections that do not directly relate to mission and items that have low utility.
3. 2022 Obj: Remove items from collections that do not directly relate to mission and items that have low utility.

Performance Measures:

<table>
<thead>
<tr>
<th>ML</th>
<th>Budget Type</th>
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<th>FY 2020 Estimate</th>
<th>FY 2020 Actual</th>
<th>FY 2021 Estimate</th>
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◆ Goal: 5 To attract audiences by creating transformative experiences through history.

Objectives:
1. 2020 Obj: Increase visitation and encourage audience growth using on-site technology.

Date Printed: 8/31/2020 5:21:24 PM	 OSPB AZIPS	 All dollars are presented in thousands (not FTE).
2021 Obj: Increase visitation and encourage audience growth using on-site technology.
2022 Obj: Increase visitation and encourage audience growth using on-site technology

<table>
<thead>
<tr>
<th></th>
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All dollars are presented in thousands (not FTE).
# Budget Related Performance Measures

**Agency:** 0.0  ARIZONA HISTORICAL SOCIETY  
**Contact:** W. James Burns, Executive Director  (480) 387-5366  
2nd Contact: William Ponder, Chief Operating Officer  (520) 628-5774  
**Statute:** A.R.S. § 41-821(A)

<table>
<thead>
<tr>
<th>ML</th>
<th>Budget</th>
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<td>☐</td>
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<td>OP</td>
<td>Number of museum visitors and researchers</td>
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All dollars are presented in thousands (not FTE).
Agency 5-Year Plan

Issue 1  Unified Organization Identity

Description: AHS strives to Create a unified identity for the organization (Internal and External)

Solutions:
Strategy 1.1. Establish AHS as a strong, recognizable brand.
Objective 1.1.1. Improve identification of historic sites and museums as entities within the AHS brand.
Objective 1.1.2. Standardize use of Arizona Historical Society as "The Brand," in all communications and marketing.
Objective 1.1.3 Engage staff to develop strong sense of unified AHS identity.
Objective 1.1.4. Increase public awareness of AHS.
Objective 1.1.5. Engage support groups and boards in discussions about the need for an AHS branded approach.
Objective 1.1.6 Establish universal AHS membership branding.
Strategy 1.2. Enhance the Certifed Museum program.
Objective 1.2.1. Create greater value for AHS Certified organizations and greater identification with AHS as a respected historical organization and partner.
Strategy 1.3. Develop performance and financial reporting metrics to reflect new organizational structure.
Objective 1.3.1 Modify reporting, budgetary alignment to reflect functional alignment with emphasis on the AHS organization as a single entity.

Issue 2  Financial Resources

Description: Enhance financial resources to advance our mission and ensure long-term sustainability and growth.

Solutions:
Strategy 2.1. Develop a planned giving program.
Objective 2.1.1 Diversify revenue streams to reduce dependence on appropriated funds.
Objective 2.1.2 Develop a high-functioning 501(c)3 for stewardship of gifts.
Strategy 2.2. Develop a grant-writing program.
Objective 2.2.1 Diversify revenue streams to reduce dependence on appropriated funds.
Strategy 2.3. Launch a capital campaign.
Objective 2.3.1. Build endowment, address deferred capital projects, create new exhibitions, and improve stewardship of collection and archival materials.
Strategy 2.4. Establish, develop and grow relationships with elected officials.
Objective 2.4.1. Build awareness of AHS’ mission and vision and an understanding of the essential role that AHS plays in communities across Arizona.
Strategy 2.5 Maximize existing earned income streams and develop new earned income streams.
Objective 2.5.1 Diversify revenue streams to decrease dependence on appropriated funds.
Strategy 2.6. Involve affiliate organizations (boards and support groups) in overall fundraising plan.
Objective 2.6.1. Grow relationships with affiliate organizations.
Strategy 2.7. Optimize AHS’ volunteer corps statewide.
Objective 2.7.1. Hire a volunteer coordinator.
Objective 2.8. Optimize AHS staff time by providing the necessary IT resources and skills (infrastructure, hardware, software, training) to do their jobs.
Strategy 2.8.1 Identify in-house staff to officially handle some IT tasks and external resources to handle other tasks.
Strategy 2.8.2. Evaluate training needs.
Strategy 2.8.3. Develop and prioritize IT needs list.

Issue 3  Community Trust

Description: To become the most trusted authority on Arizona history.

Solutions:
Strategy 3.1. Market and communicate information about our historical resources (what we have) and what we do with those resources (publications, programs, exhibitions, events, history education).
Objective 3.1.1. Increase online presence by adding more collections and publications.
Objective 3.1.2. Create online exhibitions for our longtime exhibitions currently on display.
Objective 3.1.3. Develop traveling exhibitions for historical organizations across the State.
Objective 3.1.4. Develop internal resources and resource guide for inquiries requiring subject matter expertise.
3.1.4.1. Create a book club and suggested reading list.
Strategy 3.2. Reinvent the Journal of AZ History as a modern scholarly journal and a trusted source for AZ history.
Objective 3.2.1. Promote the Journal to scholars and recruit esteemed authors.
Objective 3.2.2. Broader the topics in the Journal to be more reflective of the breadth of AZ history.
Objective 3.2.3. Improve the book review section.
Objective 3.2.4. Build a database of scholars with specialties and contact information.
Strategy 3.3. To become the "go to" place for helping to provide curriculum and lesson plans to Arizona's history / social studies teachers.
Objective 3.3.1. Develop a "Museum in a Box" program (digital or physical).
Objective 3.3.2. Explore the possibility of revising and republishing the Arizona history textbook.
Objective 3.3.3. Expand outreach program.
Issue 4  Collections

Description: To improve our ability to collect, preserve, interpret, and disseminate Arizona’s history.

Solutions:
Strategy 4.1. Concentrate collections on high-utility items
Objective 4.1.1. Remove items from collections that do not directly relate to mission and items that have low utility.
Objective 4.1.2. Actively collect high-utility items with strong provenance, research, exhibit and programming use.
Strategy 4.3. Seek federal grants to support exhibitions and programming.
Objective 4.3.1. Develop long term (3-5 years) programming and exhibition schedules.
Objective 4.3.2. Develop detailed budget for each exhibition and program.
Strategy 4.4. Develop digital and online educational programming.
Objective 4.4.1. Evaluate digital storage options.
Objective 4.4.2. Develop online educational programming.
Objective 4.4.3. Create online components for exhibitions.

Strategy 4.5. Develop a plan to disseminate historical content more broadly statewide.
Objective 4.5.1. Incorporate traveling exhibitions into long-term exhibition schedule and planning.
Objective 4.5.2. Market AHS online catalogs of objects and archival documents.

Issue 5  Audience

Description: To attract audiences by creating transformative experiences through history.

Solutions:
Strategy 5.1. Engage visitors through interactive experiences using online and on-site technology.
Objective 5.1.1. Increase visitation and encourage audience growth using on-site technology.
Objective 5.1.2. Increase digital engagement to build new audiences.
Strategy 5.2. Provide visitors with participatory experiences that unite education with entertainment.
Objective 5.2.1. Create revenue-generating on and off-site tours that promote local history and environment.
Objective 5.2.2. Analyze existing programs, adopting the most successful statewide, as appropriate.
Objective 5.2.3. Develop merchandising/cross-sales opportunities.
Strategy 5.3. Develop experiences that are meaningful and relevant to today’s audiences.
Objective 5.3.1. Create exhibitions, programs, and events that offer insights into modern day issues through a historical lens.
Objective 5.3.2. Evaluate all AHS activities to gather data that will inform future decision making about exhibitions, events, and programs.
Strategy 5.4. Conduct studies of the guest experience at each AHS location.
Objective 5.4.1. Identify opportunities to enhance guest experiences in ways that are relevant, implementable, and impactful.

Resource Assumptions

<table>
<thead>
<tr>
<th></th>
<th>FY2023 Estimate</th>
<th>FY2024 Estimate</th>
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Agency: ★ HIA  
Program: 0  Arizona Historical Society

Objective: 1  To increase the dissemination of Arizona history to the public through programming by two percent.
Goal: 1  To create a unified identity for the organization (Internal and External)
Goal: 2  To enhance financial resources to advance our mission and ensure long-term sustainability and growth.
Goal: 3  To become the most trusted authority on Arizona history.
Goal: 4  To improve our ability to collect, preserve, interpret, and disseminate Arizona's history.
Goal: 5  To attract audiences by creating transformative experiences through history.