

STRATEGIC PLAN 2021–2026



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MISSION

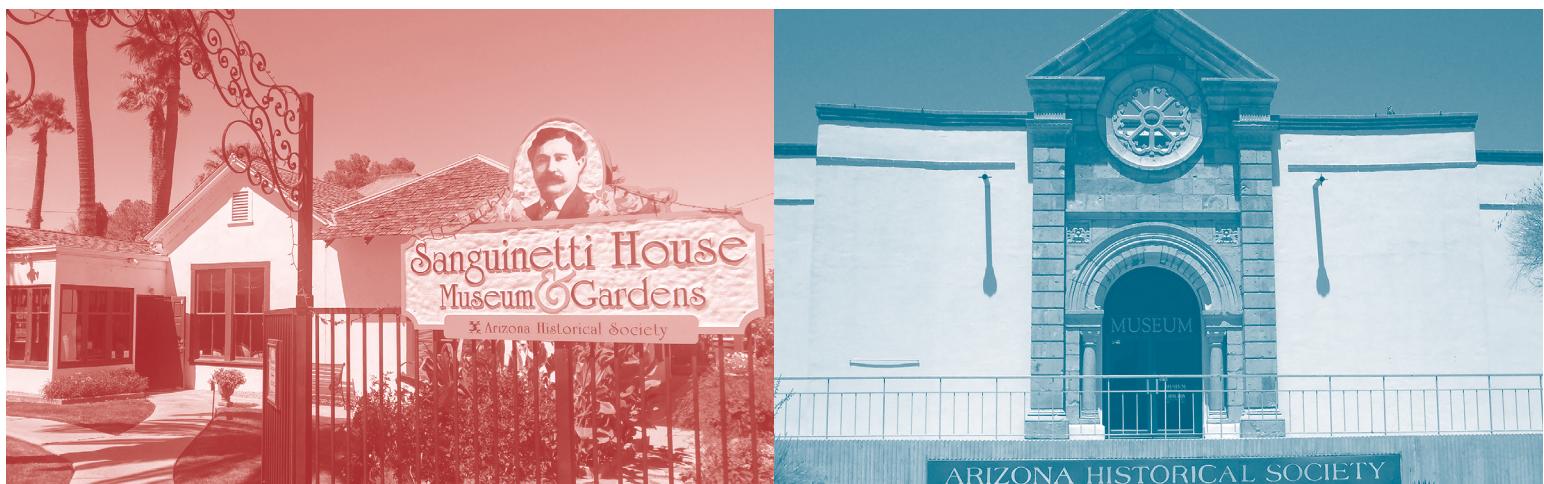
Connecting people through the power of Arizona's history.

VISION

The Arizona Historical Society seeks to be the driving force strengthening Arizona's communities by promoting history through leadership, partnership, and scholarship.

STRATEGIC GOALS

Arizona Historical Society (AHS) has identified five strategic goals that are critical to the fulfillment of our mission. These goals, as well as the related strategies and objectives, are the drivers for everything that we do.



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EXECUTIVE SUMMARY

The Arizona Historical Society (AHS), established by an act of the Arizona territorial legislature in 1864, is the oldest cultural organization in the State. AHS is both a State agency and a not-for-profit membership organization. Its mission is statewide, bounded by the borders of the State rather than the walls of any of its physical locations. (See ARS 41-821-826, azleg.gov) At its core, AHS is an educational institution, like most museums and historical organizations.

A Modernized Mission

The strategic planning process included examining and modernizing the mission statement, and creating a vision statement. AHS' mission is: *Connecting people through the power of Arizona's history.* The mission enhances AHS' statutory charge to serve as the steward of Arizona's history. We fulfill our mission by:

- Collecting, preserving, and providing access to collections, archives, and historic sites.
- Supporting local historical organizations and museums across the state through a Certified Historical Institutions Program.
- Publishing *The Journal of Arizona History*.
- Sponsoring and coordinating the National History Day program in Arizona.
- Interpreting and disseminating Arizona history through in-person and virtual programming and exhibitions and providing educators with tools for curriculum development

Vision and Direction

VISION: *The Arizona Historical Society seeks to be the driving force strengthening Arizona's communities by promoting history through leadership, partnership and scholarship.*

AHS' vision is embodied in the goals and objectives of the strategic plan. To survive, AHS will adapt to become a 21st century historical organization that fulfills its role as the only statewide historical organization by collecting and sharing Arizona's untold history not currently being preserved or shared through other organizations, and by engaging the public through multiple mediums to fill the void in historical education in the communities where AHS does not have a physical presence. AHS seeks to bridge the rural/urban divide; to do so a unified identity is essential, thus the intent of the first goal of the plan.

Mission Fulfillment

To fulfill its mission AHS must enhance and diversify its financial resources to become more sustainable, by increasing existing earned income sources, developing new sources of revenue, launching a planned giving program, and planning a capital campaign. Not only is this necessary to sustain the organization, but also to address repeated sunset review findings about AHS' reliance on the State for funding.

Interpret and Disseminate History

In the past, AHS has focused heavily on the 'collect and preserve' portion of its statutory charge, with less emphasis on interpreting and disseminating. In the 20th century, this was a common practice for museums, but the profession evolved to embrace its public service role to be educators. As the most trusted authority on Arizona history, AHS embraces its role to tell everybody's history, and all types of history, broadening its once-limited scope of military, economic, and political history from the territorial period through the 1940s. AHS understands that history is being made today, and history is what happened yesterday, and that contemporary audiences expect to learn about the recent past and how it affects their lives today.

Relevancy

Relevancy is the key to survival for cultural institutions. To connect to today's audiences, AHS will ensure that it is inclusive of the full spectrum of Arizona's demographics so individuals can see themselves in the organization, and know that they are welcome and that they belong. To do so, the *Journal of Arizona History* will be reinvented, virtual programming will be created, the topics and communities included in exhibitions and programming will be expanded, and a renewed focus will be placed on National History Day Arizona and other K-12 educational partnerships.

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The emphasis on interpreting and disseminating Arizona history will result in a pivot to accentuating what we have in our collections rather than just amassing more. The focus will be on what we do with what we have, not the act of owning or possessing things. Accordingly, AHS will thoughtfully assess its collections and archival materials to identify gaps as well as excesses. Gaps in AHS' holdings (1950s - the present) will be addressed by active collecting, including contemporaneous/crisis/rapid-response collecting of current events. Excesses will be remediated through a judicious and rigorous deaccessioning process.

Guiding Statement

To fulfill AHS' guiding statement developed during the strategic planning process: *creating transformative*

experiences through history, we will replicate our best guest experience practices throughout the organization. Our guest experience will be reflected in the virtual environment, reaching not only members, but the millions of Arizonans we are statutorily bound to serve. Evaluation will be embedded in the organization to aid in data-informed decision making, enhanced by the organization's first-ever proper market research study.

Unity, education, inclusion, relevancy, and partnerships provide the roadmap to not just survive, but thrive, well into the next century ensuring a viable and sustainable future for AHS into the 21st century and beyond.

STRATEGIC PLANNING PROCESS SUMMARY

Background

The strategic planning process was launched in mid-2017 following the retirement of a longtime director. The board appointed a visioning committee to decide what it wanted the organization to look like in the future, including new mission and vision statements. In April 2018, following a nationwide search, a new Executive Director was hired. Out of respect for the work that had already been done, the new Executive Director continued the work of the existing committee with an eye towards a comprehensive strategic plan.

Committee Expansion and Responsibilities

Fifteen committee members (board and staff) were chosen to ensure broad geographical representation of AHS constituents. They represented support groups, chapter boards, volunteers, and senior staff members from across the State. Each member had the responsibility to communicate with their constituencies and fulfill a wide range of research assignments. All meetings were open to the public, with agendas posted in advance and minutes posted shortly after the meeting. A call to the public was included in each meeting.

Rethinking and Expanding the Process

Participating board and staff members were introduced to contemporary mission and vision

statements from state historical organizations nationwide. Committee members were asked to gather sample mission and vision statements from museum and other not-for-profits. More than a dozen statements were identified as good examples of modern mission statements. None mimicked their respective state statutes. Some of the organizations added additional explanatory text regarding how they fulfill their mission, using enabling language found in their statutes.

Vetting and Tracking the Plan

A completed plan with goals, strategies, objectives, and tactics was presented to the Board of Directors for feedback. That feedback was then reviewed by the committee and incorporated into the plan. The revised plan was presented for a second review and an extended comment period. The plan was unanimously approved by the Board May 2019.

Staff was directed to add the following information within a tracking document: person responsible, contributors, timeline, measurements, resources needed, potential sources for those resources, and columns for quarterly tracking. Staff was also directed to draft an executive summary and a description of the planning process, and finally to have the portion of the plan approved at the board meeting designed and posted to the AHS website per state law.

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GOAL 1: Create a unified identity for the organization (internal and external)

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 AHS 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 Certified 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 and budgetary alignment to reflect functional organization with emphasis on the AHS organization as a single entity.

GOAL 2: Enhance financial resources to advance our mission and ensure long-term sustainability and growth

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 relationships with elected officials.

Objective 2.4.1. Build awareness of AHS’s 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 in overall fundraising plan.

Objective 2.6.1. Grow relationships with affiliate organizations.

Strategy 2.7. Optimize AHS’s volunteer corps statewide.

Objective 2.7.1. Hire a volunteer coordinator.

Strategy 2.8. Optimize AHS staff time by providing the necessary IT resources and skills (infrastructure, hardware, software, training) to do their jobs.

Objective 2.8.1. Identify in-house staff to officially handle some IT tasks and external resources to handle other tasks.

Objective 2.8.2. Evaluate training needs.

Objective 2.8.3. Develop and prioritize IT needs list.

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GOAL 3: To become the most trusted authority on Arizona history

Strategy 3.1. Market and communicate about our historical resources (what we have) and what we do with those resources (publications, programs, exhibitions, events, history education, research).

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 guides to improve staff expertise in Arizona history.

Strategy 3.2. Reinvent the Journal of Arizona History as a modern scholarly journal and a trusted source for AZ history.

Objective 3.2.1. Promote the Journal to scholars / recruit esteemed authors.

Objective 3.2.2. Broaden 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. Create 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.

GOAL 4: To improve our ability to collect, preserve, interpret, and disseminate Arizona’s history

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 4.2. Optimize collection storages space to properly preserve materials.

Objective 4.2.1. Investigate shelving options (e.g., compact or high-bay) and additional storage options (e.g., off-site).

Objective 4.2.2. Pursue funding for additional shelving.

Objective 4.2.3. Improve object housing as needed.

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 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 our online catalogs of objects and archives.

GOAL 5: To attract audiences by creating transformative experiences through history

Strategy 5.1. Engage visitors through interactive experiences using online and onsite technology.

Objective 5.1.1. Increase visitation and encourage audience growth using onsite 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.

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.



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azhs.org