

2021 - 2023 ARIZONA MASTER LIST OF STATE GOVERNMENT PROGRAMS

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 of 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 FY2021: . Increase public awareness of AHS.
 FY2022: . Increase public awareness of AHS.
 FY2023: . Increase public awareness of AHS.

Performance Measures	FY 2021 Actual	FY 2022 Estimate	FY 2023 Estimate
Number of museum visitors and researchers	12,709	15,000	18,500

Explanation: Reduced visitation due to museum closures and limited hours.

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

- Objective:** 1 FY2021: 1 Diversify revenue streams to decrease dependence on appropriated funds.
 FY2022: 1 Diversify revenue streams to decrease dependence on appropriated funds.
 FY2023: 1 Diversify revenue streams to decrease dependence on appropriated funds.

Performance Measures	FY 2021 Actual	FY 2022 Estimate	FY 2023 Estimate
increase earned various incomes	2,336,441	925,000	1,145,000

Explanation: FY21 reflects \$1.6 revenue from sale of donated property

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

- Objective:** 1 FY2021: Increase online presence by adding more collections and publications.
 FY2022: Increase online presence by adding more collections and publications.
 FY2023: Increase online presence by adding more collections and publications.

Performance Measures	FY 2021 Actual	FY 2022 Estimate	FY 2023 Estimate
improve collections accessibility	134,078	136,760	139,495

Explanation: Total of archival records and 3D artifact records available online

- Objective:** 2 FY2021: Expand access to the Journal of Arizona History
 FY2022: Expand access to the Journal of Arizona History
 FY2023: Expand access to the Journal of Arizona History

Performance Measures	FY 2021 Actual	FY 2022 Estimate	FY 2023 Estimate
Number of Journal of Arizona History downloads.	34,076	35,780	37,569

Explanation: Reflects the number of Journal of AZ History online downloads

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

- Objective:** 1 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.

FY2023: Remove items from collections that do not directly relate to mission and items that have low utility.

Performance Measures	FY 2021 Actual	FY 2022 Estimate	FY 2023 Estimate
improve quality of collections	131	170	200

Explanation: Number of non-relevant items deaccessioned

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

- Objective:** 1 FY2021: Increase visitation and encourage audience growth using on-site technology.
 FY2022: Increase visitation and encourage audience growth using on-site technology.
 FY2023: Increase visitation and encourage audience growth using on-site technology.

Performance Measures	FY 2021 Actual	FY 2022 Estimate	FY 2023 Estimate
Museum visitation	9,265	12,000	16,000

Explanation: FY21 visitation severely impacted by COVID museum closures

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
Administration (520) 628-5774

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

Objectives: 1 2021 Obj: . Increase public awareness of AHS.
2022 Obj: . Increase public awareness of AHS.
2023 Obj: . Increase public awareness of AHS.

Performance Measures:

ML	Budget	Type		FY 2020 Actual	FY 2021 Estimate	FY 2021 Actual	FY 2022 Estimate	FY 2023 Estimate
1	<input type="checkbox"/>	<input type="checkbox"/>	OP Public program attendance	19,000	10,000	6,993	8,500	10,000
			FY 21 results reflect COVID impact and loss of non-AHS owned properties (Riordan, Ft Lowell, Downtown Tucson Museum). Two of AHS four museums will re-open in FY22; the two largest ones remain open with limited hours due to staffing shortages, restricting visitor access. Industry projections indicate museum traffic will be slow to return to pre-pandemic levels. Current visitor traffic reflects this.					
2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	OP Number of museum visitors and researchers	53,711	10,000	12,709	15,000	18,500
			FY21 results impacted by COVID closures and loss of Riordan Mansion. FY22 & 23 reflect the termination of Riordan, Ft Lowell and Downtown museums, as well post-COVID slow ramp up of visitation to remaining 4 museums. FY21-23 numbers reflect addition of museum grounds visitors.					
3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	IP Number of volunteer hours	1,736	500	2,145	2,400	2,650
			Due to COVID museum closures, volunteer hours were limited to projects that could be completed safely outdoors or virtually.					
4	<input type="checkbox"/>	<input type="checkbox"/>	OC website and social media users, reach and followers analytics	15,931	18,673	21,709	23,879	26,268
			Increased use of social media platforms such as Twitter, Instagram, YouTube and LinkedIn are contributing to increased reach.					

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

Objectives: 1 2021 Obj: 1 Diversify revenue streams to decrease dependence on appropriated funds.
2022 Obj: 1 Diversify revenue streams to decrease dependence on appropriated funds.
2023 Obj: 1 Diversify revenue streams to decrease dependence on appropriated funds.

Performance Measures:

ML	Budget	Type		FY 2020 Actual	FY 2021 Estimate	FY 2021 Actual	FY 2022 Estimate	FY 2023 Estimate
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	IP increase earned various incomes	1,295,471	872,000	2,336,441	925,000	1,145,000
			FY21 results reflect the revenue realized from the sale of donated property of \$1.6 million, as well as increased earned revenue from online Journal downloads from Project MUSE and JSTOR. FY22 revenue estimate based on continued limitations on earned revenue streams resulting from COVID, ie. Reduced visitation, reduced events and reduced in-person programs and school tours.					

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

Objectives: 1 2021 Obj: Increase online presence by adding more collections and publications.
2022 Obj: Increase online presence by adding more collections and publications.
2023 Obj: Increase online presence by adding more collections and publications.

Performance Measures:

ML	Budget	Type		FY 2020 Actual	FY 2021 Estimate	FY 2021 Actual	FY 2022 Estimate	FY 2023 Estimate
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				FY 2020 Actual	FY 2021 Estimate	FY 2021 Actual	FY 2022 Estimate	FY 2023 Estimate
ML Budget Type								
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	QL improve collections accessibility	79,920	79,700	134,078	136,760	139,495
FY21-23 numbers reflect the total number of records available online for both 3D artifact collections and archival collections.								
Objectives:								
2 2021 Obj: Expand access to the Journal of Arizona History								
2022 Obj: Expand access to the Journal of Arizona History								
2023 Obj: Expand access to the Journal of Arizona History								

Performance Measures:

				FY 2020 Actual	FY 2021 Estimate	FY 2021 Actual	FY 2022 Estimate	FY 2023 Estimate
ML Budget Type								
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	OC Number of Journal of Arizona History downloads.	0	0	34,076	35,780	37,569
The Journal of Arizona History is now available online via JSTOR and Project MUSE. The number of downloads is an indicator of the impact and reach of the Journal, and reflects the credibility of the publication and organization.								

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

Objectives: 1 2021 Obj: Remove items from collections that do not directly relate to mission and items that have low utility.
 2022 Obj: Remove items from collections that do not directly relate to mission and items that have low utility.
 2023 Obj: Remove items from collections that do not directly relate to mission and items that have low utility.

Performance Measures:

				FY 2020 Actual	FY 2021 Estimate	FY 2021 Actual	FY 2022 Estimate	FY 2023 Estimate
ML Budget Type								
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	QL improve quality of collections	80	220	131	170	200

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

Objectives: 1 2021 Obj: Increase visitation and encourage audience growth using on-site technology.
 2022 Obj: Increase visitation and encourage audience growth using on-site technology.
 2023 Obj: Increase visitation and encourage audience growth using on-site technology.

Performance Measures:

				FY 2020 Actual	FY 2021 Estimate	FY 2021 Actual	FY 2022 Estimate	FY 2023 Estimate
ML Budget Type								
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	OP Museum visitation	0	0	9,265	12,000	16,000
2 of 4 museums remained closed throughout FY21; the two largest opened in October 21 with limited hours. Numbers also reflect the loss of non-AHS museum visitation (Riordan Mansion, Ft Lowell, Downtown History Museum). Projections for FY22 and 23 are conservative based on industry predictions that visitation will build slowly after the pandemic.								

Budget Related Performance Measures

Arizona Historical Society

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)

ML	Budget	Type	Performance Measure	FY 2020 Actual	FY 2021 Estimate	FY 2021 Actual	FY 2022 Estimate	FY 2023 Estimate
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	OP	Number of museum visitors and researchers Reduced visitation due to museum closures and limited hours.	53,711	10,000	12,709	15,000	18,500
<input type="checkbox"/>	<input checked="" type="checkbox"/>	IP	Number of volunteer hours Volunteer hours completed virtually or off-site.	1,736	500	2,145	2,400	2,650

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 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, 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 2.7.1. 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. 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. 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 onsite 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

	FY2024 Estimate	FY2025 Estimate	FY2026 Estimate
Full-Time Equivalent Positions	46.3	46.3	46.3
General Fund	2,906.0	2,906.0	2,906.0
Other Appropriated Funds	0.0	0.0	0.0
Non-Appropriated Funds	1,230.0	1,353.0	1,488.0
Federal Funds	0.0	0.0	0.0