



STRATEGIC PLAN 2021-2026

Interim Report for FY 2024

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AHS Executive Director
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ARIZONA HISTORICAL PLAN

STRATEGIC INSTITUTIONAL PLAN FY21 - FY26

August 2023

The Arizona Historical Society has identified six 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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1. MANAGEMENT BOARD AND STAFF

MUSEUM STAFF

SENIOR LEADERSHIP

Executive Director (Tempe)

- Executive Staff Assistant (Tempe)
- Grants Coordinator (Tempe)
- Assistant Director: Missions (Tempe)
- Assistant Director: Operations (Tucson)
- Assistant Director: Development (Tempe)¹
- Development Director (Tucson)
- Vice President of Publications (Tucson)
- Vice President of Education (Tucson)
- Vice President of Finance (Tucson)

LIBRARY, ARCHIVES, COLLECTIONS, AND EXHIBITS (LACE)

- Assistant Director: Missions (Tempe)
 - Archivist (Tempe)
 - Archivist (Tempe)
 - Archivist (Tucson)
 - Archivist (Tucson)
- Head of Exhibits (Tucson)
 - Exhibit Preparator (Tucson)
- Exhibit Curator (Tempe)
 - Exhibit Preparator (Tempe)
- State Curator (Tempe)
 - Registrar (Tempe)
- Curator (Tucson)
 - Registrar (Tucson)

EDUCATION

- Vice President of Education (Tucson)²
 - National History Day (NHD) Coordinator (Tucson)
 - Museum Education Curator (Tempe)
- Sanguinetti Museum Manager (Yuma)³
- Pioneer Museum Manager (Flagstaff)

¹Formal Classification: Vice President of MarComm

²Formal Classification: Education Program Manager

³Temporary reassignment from Flagstaff Museum Manager, not to exceed 6 months.

MUSEUM STAFF cont.

PUBLICATIONS

Vice President of Publications (Tucson)⁴

JAH Managing Editor (Tucson)⁵

History Engagement Coordinator (Tucson)⁶

MARKETING & COMMUNICATIONS (MarComm)

Assistant Director: Development (Tempe)⁷

Facility Rental Coordinator (Tempe)

Program Project Specialist (Tucson)

Communications Manager (Tempe)⁸

Graphic Designer 2 (Tempe)

Outreach & Membership Coordinator (Tempe)⁹

FINANCE

Vice President of Finance (Tucson)¹⁰

Administrative Services Officer 1 (Tucson)

Procurement Technician (Tucson)

FACILITIES

Assistant Director: Operations (Tucson)

Facilities Coordinator (Tempe-Flagstaff)

Facilities Specialist (Tucson-Yuma)

Facilities Specialist (Tucson-Yuma)

Custodial Supervisor (Tempe-Flagstaff)

GUEST EXPERIENCE

Assistant Director: Operations (Tucson)

Volunteer Coordinator (Tempe)

Guest Experience Specialist (Tempe)

Administrative Assistant 3 (Tempe)

Guest Experience Specialist (Flagstaff, PT)

Guest Experience Specialist (Tucson)

Guest Experience Specialist (Yuma)

Guest Experience Specialist (Yuma, PT)

Guest Experience Specialist (Yuma, PT)

⁴Formal Classification: Sr Museum Administrator

⁵Formal Classification: Curator

⁶Formal Classification: Executive Consultant

⁷Formal Classification: Vice President of MarComm

⁸Formal Classification: Communications Systems Specialist

⁹Formal Classification: Administrative Services Officer 1

¹⁰Formal Classification: Administrative Services Officer 4



2. SWOT ANALYSIS

An agency-wide Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis was completed on May 23, 2022. This report was generated with the consideration of both AHS staff, its Board of Directors, Chapters, and Support Groups. In total, 23 staff, 6 Board, 13 Chapter members, and 6 Support Group members responded. The survey featured both qualitative and quantitative prompts, and its conclusions informed the drafting of this interim report.

The results of this survey were published in two separate documents, which may be accessed via the links below:

- [1. AHS 2022 SWOT Survey: Summary](#)
- [2. AHS 2022 SWOT Survey: Full Report](#)

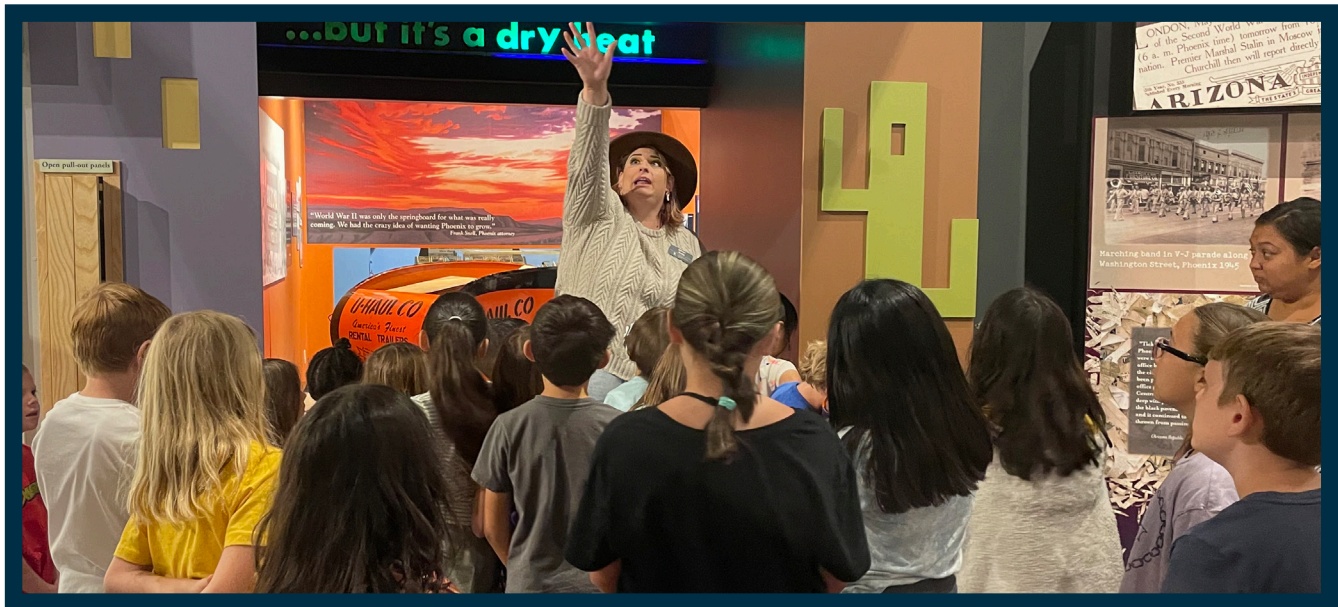
3. MAJOR GOALS

In its interim update to the FY21-26 Strategic Plan, the Arizona Historical Society has identified 6 primary goals to further its development-based objectives. These goals are supported by multiple strategies, which are in turn broken down into singular actions with clear benchmarks for their success. Where appropriate, hard data points have been created using data taken from FY19-22, incorporating both pre-COVID performance numbers and post-COVID recovery realities. It has been developed across three stages of feedback, which ran from October 2022 through July 2023: a Director's initial review, a "Small Committee" composed of two members of the AHS State Board and two AHS staff members, and a final review that was open to all State Board members and all AHS staff.

This section is paired with the succeeding Section 4: Specific Objectives, which provides the schedule and evaluation criteria for the completion of all Major Goals.

Goal 1. - Make AHS the most trusted authority on Arizona history.

Strategy 1.	Develop a professional staff of experts knowledgeable in their respective fields.
	<ul style="list-style-type: none"> • Grow agency headcount and personnel budget to support departmental growth. • Establish competitive salaries to assist in staff recruitment and retention. • Optimize identification, recruitment, and retention of talented individuals. • Develop internal resources and guides to improve staff expertise in Arizona history. • Enhance outreach by AHS staff on services and expertise.
Strategy 2.	Enhance Certified Historic Institution program.
	<ul style="list-style-type: none"> • Create greater value for AHS Certified organizations and greater identification of AHS as a respected historical organization and partner. • Expand partnership programs and cross-promotional opportunities with Certified organizations, including traveling exhibits, learning resources, digital content, etc. • Expand the total number of Certified organizations, including in grants annually awarded.
Strategy 3.	Enhance the AHS publications program.
	<ul style="list-style-type: none"> • Continue to grow recognition of the <i>Journal of Arizona History</i> as a trusted scholarly source. • Attempt to broaden topics in the <i>Journal</i> to be more reflective of the breadth of Arizona history, including addressing developing and "hot topics" in Arizona history. • Promote the <i>Journal</i> to scholars and recruit authors (novel and esteemed) to serve as contributors. • Explore additional publication opportunities, including the Arizona history textbook and co-published texts with regional partners. • Grow the AHS research fellowship to fund additional visiting scholars at higher levels than current funding allows and work to convert fellows into <i>Journal</i> authors and/or book authors with the University of Arizona Press series. • Explore ways to grow the digital footprint of AHS, bringing the scholarship of the <i>Journal</i>, research fellows, and our scholarly network to the public in accessible ways.



Goal 1. continued - Make AHS the most trusted authority on Arizona history.

Strategy 4.	Become the “go-to” place for educators and students interested in Arizona’s history.
	<ul style="list-style-type: none"> • Expand the reach and impact of Arizona National History Day. • Grow annual educational attendance (non-NHD) to 1,800 by EOY FY26.¹¹ • Create dedicated educational lessons for grades K-12 and beyond, incorporating a pedagogy of “deep engagement” and tactile learning. • Expand educational offerings to include lesson plans that place STEM subjects in historical context for use in multiple classroom and grade settings. • Expand and market physical and digital learning resources for educators and students. • Expand school and educator engagement.
Strategy 5.	Pursue relevant certifications, recognitions, and awards.
	<ul style="list-style-type: none"> • Maintain AAM accreditation. • Participate in panels and presentations for regional and national conferences.
Strategy 6.	Develop Membership to be an engaged and inspired community partner.
	<ul style="list-style-type: none"> • Grow AHS memberships to 1,500 annually by EOY FY26, with developed strategy for inspiring updates to existing membership levels (e.g. individual to steward or ambassador).¹² • Explore the possibility of an expanded and enhanced members-only and general subscribers newsletter • Enhance the value of membership through new exclusive membership events, and perks of membership that meet or exceed industry standards. • Encourage volunteerism among members • Engage with different communities to ensure diversity in demographics, region, and age, among other things, among the AHS membership

¹¹FY22 Field Trips totaled 698 students state-wide. Museums with larger educational teams but serving smaller population areas traditionally hit 1,000 students PER SITE (IVDM: 3 educators, 190,000 population).

¹²Current FY23 projections: 1,318 members.

Goal 2. - Enhance AHS' capacity to collect, preserve, interpret, and disseminate Arizona's history.

Strategy 1.	Develop a professional staff of experts knowledgeable in their respective fields.
	<ul style="list-style-type: none"> • Concentrate collections and archives acquisitions and stewardship on high-utility, mission-based items. • Identify areas of deficiency in existing 3D and archival coverage, and future acquisitions and stewardship goals. • Remove items from collections that do not directly relate to mission and items that have low utility. • Actively collect high-utility items with strong provenance, research and reference, exhibit, and programming use.
Strategy 2.	Optimize collections and archival storage spaces to properly preserve materials.
	<ul style="list-style-type: none"> • Investigate shelving options (e.g., compact or high-bay) and additional storage options (e.g., off-site). • Strategize expansion strategies for off-site or add-on storage.
Strategy 3.	Optimize collections and archival records and access.
	<ul style="list-style-type: none"> • Maintain paper and digital accession records for a 1:1 correlation with their respective item. • Continue digitization of AHS archives content – finding aids and primary source documents – for online access • Develop a Digital Asset Management System (DAMS) to collect, manage, and preserve internal digital records and digital-born materials. • Expand AHS online collections catalogs with new records and supporting materials. • Market AHS' services, including reading rooms, and online catalogs of objects and archives.



Goal 3. - Develop experiences that are meaningful and relevant to today's audiences.

Strategy 1.	Conduct studies of the guest experience and community needs and interests at each AHS location.
	<ul style="list-style-type: none"> • Identify core and emerging audiences, organizations, and groups across Statewide communities. • Conduct community polling on relevant and “hot topics” in history. • Identify opportunities to enhance guest experiences in ways that are relevant, implementable, and impactful.
Strategy 2.	Develop innovative, engaging, and immersive exhibition content.
	<ul style="list-style-type: none"> • Publish a methodological strategy to establish future exhibition standards. • Create and promote a revolving slate of temporary and pop-up exhibits that are available to statewide organizations. • Work with community partners to develop dynamic in-agency exhibitions and content, and AHS’ support of in-community exhibitions and content. • Develop opportunities for traveling exhibits, including previous AHS temporary exhibits. • Update technologies and ADA access to all AHS exhibits (permanent and temporary). • Develop paired online content with all AHS exhibitions, and ensure community and partner access and promotion. • Create unique online exhibitions. • Develop a permanent outdoor exhibition space in the Molina Block, Yuma. • Strategize and develop a major update to AHS’ permanent exhibits.
Strategy 3.	Develop activities that promote AHS services and resources.
	<ul style="list-style-type: none"> • Grow visitation and engagement at all 4 AHS museums to 65,000 annually by EOY FY26.¹³ • Increase online presence by adding more digital programming and recurring social media content, including behind-the-scenes tours and staff spotlight videos. • Expand History Engagement program through participation in external community events, media appearances, guest speaker requests, op-eds, etc. • Develop on-site and in-community themed events and recurring family programs that celebrate Arizona’s history.

¹³ Current FY23 projections: 32,000 – with Pioneer closed for the majority throughout. Required FY24 average: 12,500 visitor per location (1,042 monthly).

Goal 4. - Establish AHS as a strong, recognizable brand.

Strategy 1.	Build awareness of AHS' mission and vision.
	<ul style="list-style-type: none"> • Establish relationships with elected officials, educational institutions, and community leaders. • Engage Chapters, Boards, and partners to enhance regional awareness and initiatives. • Promote identification of historic sites and museums as entities within the AHS brand. • Expand marketing and advertising about AHS' programs, exhibits, publications, resources (i.e. collections, archives), and services across the state (and beyond).
Strategy 2.	Align internal AHS policies and documentation under a single, state-wide structure.
	<ul style="list-style-type: none"> • Develop key terminology and policy statements for agency-wide use. • Engage staff and external partners to develop a strong sense of unified AHS identity. • Develop, modify, and maintain performance and financial reporting metrics to recognize department initiatives and reflect AHS as a single entity.
Strategy 3.	Develop a unified marketing strategy.
	<ul style="list-style-type: none"> • Standardize use of Arizona Historical Society, logo, colors, and aesthetic design as "The Brand." • Establish objectives and an annual budget for digital, broadcast, and published advertising and outreach across state and local markets. • Develop clear "identities" and "voices" in online media to thematically engage diverse audiences across current and future platforms. • Establish universal AHS membership branding. • Develop signature programming, including online, public, fundraiser, and Development events. • Develop core marketing strategy and documentation for each department and activity at AHS, including: <ul style="list-style-type: none"> ▪ Individual museum locations ▪ Educational Programs ▪ Development (Investment/Legacy) Opportunities ▪ Publications ▪ Speaker Requests (History Engagement Coordinator) ▪ Event Rentals ▪ Membership ▪ Visitation: historic sites and museums ▪ Exhibits (Permanent and Temporary/Revolving) ▪ Collections and Archives (Donations, Management, and Inquiries/Access)
Strategy 4.	Ensure easy access to AHS news, activities, and updates.
	<ul style="list-style-type: none"> • Update AHS website with greater focus on user accessibility and functionality. • Update POS for easier visitor purchases and staff management. • Update event management policies to reflect best-use software and practices. • Develop seasonal calendars and one-off graphics, online event pages, and other supporting media for all AHS events (distinguishing public vs private offerings). • Maintain active dialogues with local, regional, and statewide news outlets, including newspapers, television, radio, and podcasts. • Maintain active mailing lists to include Statewide elected officials, local Chambers of Commerce, educators, and key business and community stakeholders.

Goal 5. - Enhance financial resources to advance AHS' mission and ensure long-term sustainability and growth.

Strategy 1.	Diversify revenue streams to reduce dependence on appropriated funds.
	<ul style="list-style-type: none"> • Retain a Development Director to manage growth-based initiatives. • Develop a planned giving program. • Develop a grant-writing program, growing grants awarded annually to a sustainable \$250,000 by EOY FY26. • Develop a high-functioning 501(c)3 partner for stewardship of gifts.
Strategy 2.	Maximize existing earned income streams and develop new earned income streams.
	<ul style="list-style-type: none"> • Develop merchandising/cross-promotional opportunities with other AHS operations (e.g. new exhibits). • Grow Gift Shop sales to \$60,000 by EOY FY26.¹⁴ • Grow Event Rental sales to \$275,000 by EOY FY26.¹⁵ • Grow Paid Program sales to \$100,000 by EOY FY26.¹⁶ • Grow Admissions sales to \$150,000 by EOY FY26.¹⁷
Strategy 3.	Update AHS budget and investment funds to align with best practices and Strategic Plan.
	<ul style="list-style-type: none"> • Align funding allocations and expenditure reports in the annual budget to reflect departmental and operational needs. • Reallocate Investment Funds to accurately reflect and discern operational reserves, awarded grants, and restricted accounts toward select departments/activities.
Strategy 4.	Develop a strategic plan for long-term facilities care and future-capacity needs.
	<ul style="list-style-type: none"> • Identify and prioritize development needs for AHS facilities, with particular attention to AHC Tempe and AHM Tucson, and historic properties. • Identify internal solutions and external partners to lead and maintain development efforts. • Establish clear financial and handling practices, including donor management and recognition. • Develop singular and recurring funding sources to sustainably address AHS' operational and initiative-based needs.
Strategy 5.	Involve affiliate organizations in the overall fundraising plan.
	<ul style="list-style-type: none"> • Grow relationships with affiliate organizations. • Implement formal partnership contracts with AHS Support Groups.

¹⁴ FY22 Gift Shop Sales were \$31,465. FY21 Sales were \$20,603. FY20 Sales (minimal COVID impact) were \$63,664 and represent the desired goal to return to for immediate growth through FY26.

¹⁵ FY22 Rental income was \$161,742. FY21 Rentals were \$172,286. FY20 Rentals (minimal COVID impact) were \$357,827 and represent the desired goal to return to for immediate growth through FY26.

¹⁶ FY22 Paid Programs sales were \$76,800. FY21 Paid Programs were \$75,202. FY20 Paid Programs (minimal COVID impact) were \$60,466.

¹⁷ FY22 Admissions sales were \$88,516. FY21 Admissions were \$24,972. FY20 Admissions (minimal COVID impact) were \$179,979 and represent the desired goal to return to for immediate growth through FY26.

Goal 5. continued - Enhance financial resources to advance AHS' mission and ensure long-term sustainability and growth.

Strategy 6.	Develop a long-term strategy for AHS facilities and historic properties.
	<ul style="list-style-type: none"> • Establish a dedicated budget for the repair and annual preventative maintenance of AHS' historic sites. • Establish an annual list of facilities/projects for priority care. • Establish annual operating costs for AHS facilities statewide. • Develop a restoration strategy and budget for Molina Block building in Yuma. • Develop a relocation strategy for AHM Tucson by no later than 2050.
Strategy 7.	Optimize operations and seek reductions in cost.
	<ul style="list-style-type: none"> • Enhance the AHS volunteer corps and internships statewide. • Develop an archive of clear and accessible resources for staff training and reference. • Provide necessary IT resources and skills (infrastructure, hardware, software, training). <ul style="list-style-type: none"> ▪ Identify in-house or contracted staff to officially handle/delegate IT tasks. ▪ Evaluate training needs. ▪ Develop and prioritize IT needs list. • Seek cost-sharing agreements with other State agencies.



Goal 6. - Cultivate key partnerships across Arizona and beyond.

Strategy 1.	Engage the regional networks of the AHS Board of Directors.
	<ul style="list-style-type: none"> • Visit non-AHS regional museums and societies, meet and greet, collect names and contacts and funnel to AHS for implementation. • Plan future engagements, speakers, offerings from AHS. Coordinate with AHS staff to provide Board Members with speaking points. • Support AHS Legislative initiatives through contact campaigns to elected officials • Collaborate with individual board members on visitation to museums in their immediate regions. • Increase expectations of Board members to commit time and resources in support of AHS Committee initiatives and programs.
Strategy 2.	Enhance partnerships with AHS Support Groups.
	<ul style="list-style-type: none"> • Identify and develop mutual fundraising strategies. • Generate quarterly virtual/hybrid “Town Hall” joint discussion sessions with Support Groups for mutual strategic planning/coordination; record and publicly post. • Funnel actionable content and initiatives to AHS Outreach Committee for review and enactment.
Strategy 3.	Engage AHS Chapters and CHIs.
	<ul style="list-style-type: none"> • Support the development of Chapters into filled and energized organizations. • Market to and engage local communities within the five “regions” of Arizona. • Develop mutual goals and reporting schedules between Marketing staff and AHS Outreach Committee.
Strategy 4.	Enhance awareness of AHS within the Arizona State government.
	<ul style="list-style-type: none"> • Develop a dedicated outreach strategy to engage key stakeholders within the Arizona Legislature, Governor’s Office, and other statewide agencies and boards. • Enhance attendance by State representatives at AHS outreach events and press releases. • Cultivate Legislative and Executive support for AHS’ initiatives and operational needs.
Strategy 5.	Expand recurring conversations and considerations with educators statewide.
	<ul style="list-style-type: none"> • Develop a dedicated outreach strategy to engage key stakeholders within local, regional, and County schools and school districts. • Engage local and state colleges to provide internship and on-site learning opportunities for students, developing the next generation of Arizona historians and education professionals. • Facilitate conversations with educators and researchers for future collaborations, including guest authors, featured speakers, exhibits, and partnered research or grants.
Strategy 6.	Enhance partnerships with local, regional, and statewide social clubs, chambers of commerce, and other organized groups.
	<ul style="list-style-type: none"> • Develop presence at hosted and through co-hosted events. • Promote tourism and joint development opportunities. • Develop stakeholders and partners for joint grants and initiatives.

4. SPECIFIC OBJECTIVES

This section serves to provide the schedule and evaluation criteria for the completion of AHS' Strategic Goals through FY2026. All goals, strategies, and action steps herein are recognized needs and priorities for the intervening years above others, but are further ranked between the categories of **Low, Mid, and High** to recognize prioritization between them. The "Status" of an individual action step is described as either **Pending, In Progress, Ongoing, or Completed**. This section will continue to be updated annually within each successive year's Interim Strategic Plan Report. All project term dates listed reflect fiscal years, not calendar years.

This section has been developed across three stages of feedback: a Director's initial review, a "Small Committee" composed of two members of the AHS State Board and two AHS staff members, and a final review that was open to all State Board members and all AHS staff.

Goal 1. - Make AHS the most trusted authority on Arizona history.

Strategy 1. Develop a professional staff of experts knowledgeable in their respective fields.

Action Step	Priority	Person/s	Year	Status	Methodology
Grow agency headcount and personnel budget to support departmental growth.	High	Executive Director VP of Finance Development Director	2024 - 2026	Ongoing	<p>FY24—Lobby for increased state funding and work with donors to grow budget for staff salaries and ERE.</p> <p>FY25—Ensure all current positions fully funded and are sustainable financially.</p> <p>FY25—Update and develop FY26 budget to accommodate requested increase and reception response.</p> <p>FY25—Work with relevant state entities to allow for headcount growth as additional funding becomes available.</p> <p>FY26—Grow headcount to 55.</p>



Goal 1. continued - Make AHS the most trusted authority on Arizona history.

Strategy 1. Develop a professional staff of experts knowledgeable in their respective fields.

Action Step	Priority	Person/s	Year	Status	Methodology
Establish competitive salaries to assist in staff recruitment and retention.	High	Executive Director Assistant Director: Operations Development Director	2024 - 2026	Pending	<p>FY24 - 26—Keep up-to-date with nationwide salary trends in the field.</p> <p>FY25—Work to increase funding to attain and maintain nationally competitive staff salaries.</p> <p>FY26—Explore possibility of endowing certain key positions to free up portion of state appropriation.</p>
Optimize identification, recruitment, and retention of talented individuals.	Mid	Executive Director Assistant Director: Operations	2025 - 2026	Pending	<p>FY25—Build and maintain connections with relevant regional and national organizations to make connections with talented professionals to recruit as staff.</p> <p>FY26—Build AHS' reputation nationally as an impressive state historical society and good place to work.</p>

Goal 1. continued - Make AHS the most trusted authority on Arizona history.

Strategy 1. Develop a professional staff of experts knowledgeable in their respective fields.

Action Step	Priority	Person/s	Year	Status	Methodology
Develop internal resources and guides to improve staff expertise in Arizona history.	Mid	VP of Publications History Engagement Coordinator JAH Managing Editor Archivists (all) With support from: Assistant Director: Operations Communica- tions Manager Admin Services Officer 1	2024 - 2026	Ongoing	<p>FY24—Increase personal subscriptions made available to staff through agency subscriptions (e.g. AAM membership).</p> <p>FY24 - 25—Develop physical staff resources and creative ways to support their use (e.g. staff libraries, quarterly book club).</p> <p>FY24 - 25—Centralize staff resources in a suitable and accessible digital format (e.g. website portal, Google Drive). To include current & back issues of the JAH.</p> <p>FY24 - 26—Ensure agency-wide awareness of interdepartmental support and expertise for additional training (e.g. Publications for writing/editing, archives for research, personal networks & partners, MarComm for design and effective language).</p> <p>FY24 - 26—Incentivize staff to take advantage of already-existing resources (e.g., AZ tuition support, the JAH, virtual programs (both new and recorded)).</p>

Goal 1. continued - Make AHS the most trusted authority on Arizona history.

Strategy 1. Develop a professional staff of experts knowledgeable in their respective fields.

Action Step	Priority	Person/s	Year	Status	Methodology
Enhance outreach by AHS staff on services and expertise.	Low	Assistant Director: Development VP of Publications History Engagement Coordinator Outreach Committee	2024 - 2026	Ongoing	<p>FY24—Ensure that staff biographies on our website are up-to-date and clearly indicate staff backgrounds, credentials, and areas of expertise.</p> <p>FY24—MarComm to establish and facilitate introductions of departmental PAO/PIOs for all media inquiries and partnership, and provide instruction & training for media presentations.</p> <p>FY24—Encourage staff to seek partnerships with regional/state organizations, the media, and college or secondary classrooms, referring contacts to departmental PAO/PIOs.</p> <p>FY25 - 26—Develop staff highlight features on produced media to promote their work and expertise.</p> <p>FY25 -26—Establish AHS staff PAO/PIOs on local/regional/state/national “subject expert” lists.</p> <p>FY24 - 26—Work with the Outreach Committee to integrate AHS messaging and media outreach on services/activities through CHI-member events.</p>



Goal 1. continued - Make AHS the most trusted authority on Arizona history.

Strategy 2. Enhance Certified Historic Institution program.					
Action Step	Priority	Person/s	Year	Status	Methodology
Create greater value for AHS Certified organizations and greater identification of AHS as a respected historical organization and partner.	Mid	Outreach Committee State Board (e.g. Linda Elliot-Nelson) AHS Staff CHI-member representatives	2024 - 2026	Pending	FY24 —Poll CHI members to understand current member needs and areas of interest for future development. FY24 —Establish quarterly “mixers” with revolving host agreement to various CHI member sites. FY26 —Develop greater collaboration and visitation to CHIs by AHS staff for professional consultation, mentorship, and “town hall” listening tours.
Expand partnership programs and cross-promotional opportunities with Certified organizations, including traveling exhibits, learning resources, digital content, etc.	Mid	Assistant Director: Development Membership Coordinator With support from: Communications Manager	2024 - 2025	Pending	FY24 —Survey CHIs to determine their greatest needs/wants as participating members. FY24 —Develop discounts and pricing for AHS services for CHI members (digitization, reference, traveling exhibits, etc). FY25 —Build free organizational reference materials and market paid services to CHIs in support of their operational and technical growth, and aggregate materials in a centralized, digital location.
Expand the total number of Certified organizations, including in grants annually awarded.	Mid	Assistant Director: Development Membership Coordinator Communications Manager	2024 - 2026	Ongoing	FY24 —Create marketing and promotional materials extolling the virtues and benefits of AHS’ CHI program. FY24 —Ensure that all relevant cultural institutions are aware of the CHI program (via targeted mailings or emails). FY26 —Grow total CHIs to 70-75 members; grow grant budget to \$50,000.

Goal 1. continued - Make AHS the most trusted authority on Arizona history.

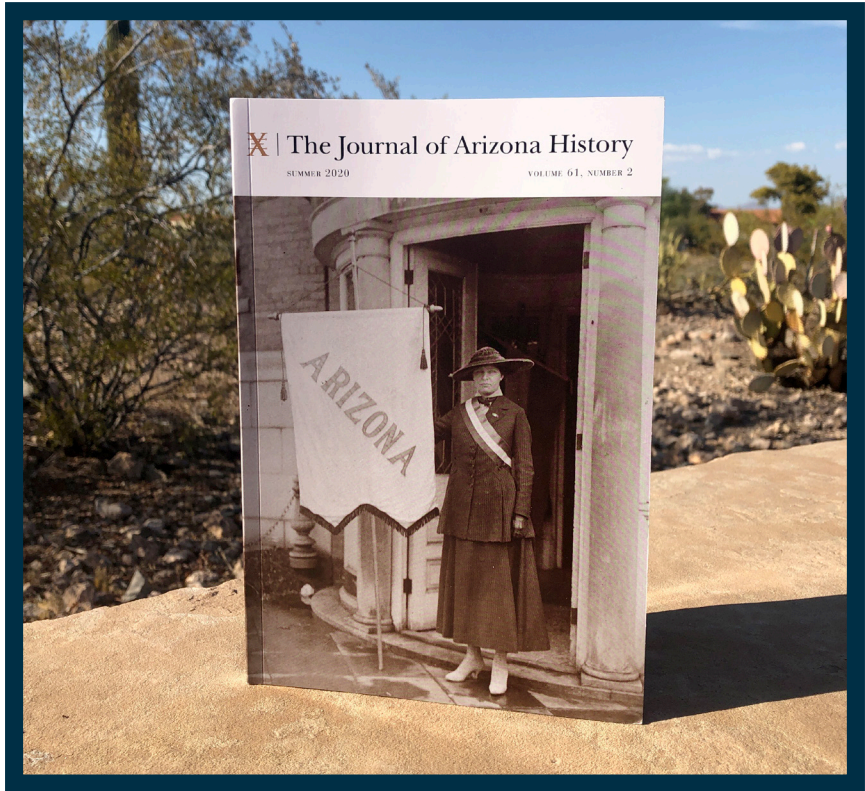
Strategy 3. Enhance the AHS publications program.					
Action Step	Priority	Person/s	Year	Status	Methodology
Continue to grow recognition of the <i>Journal of Arizona History</i> as a trusted scholarly source.	Mid	VP of Publications JAH Managing Editor	2024 - 2026	Ongoing	<p>Ongoing—Promote the <i>JAH</i> at the Western History Association conference and other history conferences.</p> <p>Ongoing—Encourage scholarly engagement with the <i>JAH</i> on Project MUSE and JSTOR, working to increase downloads.</p>
Attempt to broaden topics in the <i>Journal</i> to be more reflective of the breadth of Arizona history, including addressing developing and “hot topics” in Arizona history.	High	VP of Publications JAH Managing Editor	2024 - 2026	Ongoing	<p>FY24—Develop plans for potential alternative article formats that might appeal more to our members and to be published within regular issues of the <i>Journal</i>, e.g., more photo essays, edited and annotated primary sources (like the Mim Walsh diary), short “archival spotlight” essays, etc.</p> <p>FY24—Identify potential special issue topics that might appeal to both scholars and AHS members.</p> <p>FY24 -26—Identify, cultivate, and recruit the best amateur and emerging historians who write about Arizona history and selectively publish them alongside professional historians.</p>
Promote the <i>Journal</i> to scholars and recruit authors (novel and esteemed) to serve as contributors.	High	VP of Publications JAH Managing Editor	2024 - 2026	Ongoing	<p>Ongoing—Continue to build AHS’ network of western historians by attending annual WHA conference, connecting and engaging with scholars on Twitter, and using current contacts to develop new contacts.</p>

Goal 1. continued - Make AHS the most trusted authority on Arizona history.

Strategy 3. Enhance the AHS publications program.					
Action Step	Priority	Person/s	Year	Status	Methodology
Explore additional publication opportunities, including the Arizona history textbook and co-published texts with regional partners.	Mid	VP of Publications Development Director	2024 - 2026	Ongoing	<p>Ongoing—Work with University of Arizona Press on the forthcoming book series “Arizona Crossroads.”</p> <p>FY24 - 26—Seek a financial donor/sponsor to annually underwrite the JAH. Reallocate current resources to new publications initiatives.</p> <p>FY24 - 26—Explore any other potential options that might help further the cause of Arizona history (e.g., an Arizona Encyclopedia; a quarterly “museum highlights” magazine with historical stories from within the quarter, employee gift shop picks, recommended day trips to museums/historic sites, upcoming event calendars).</p> <p>FY25 - 26—Explore the development of a new 3rd-grade Arizona history text (especially in digital format).</p>
Grow the AHS research fellowship to fund additional visiting scholars at higher levels than current funding allows; convert fellows into <i>Journal</i> authors and/or book authors with the University of Arizona Press series.	Mid	VP of Publications <i>JAH</i> Managing Editor Development Director	2024 - 2026	Ongoing	<p>FY24 - 26—Identify new funding opportunities in the form of grants or donors, with emphasis on multi-year support.</p> <p>FY24 - 26—Develop solicitation of named fellowships (either individuals or corporate).</p>

Goal 1. continued - Make AHS the most trusted authority on Arizona history.

Strategy 3. Enhance the AHS publications program.					
Action Step	Priority	Person/s	Year	Status	Methodology
Explore ways to grow the digital footprint of AHS, bringing the scholarship of the <i>Journal</i> , research fellows, and our scholarly network to the public in accessible ways.	Low	VP of Publications History Engagement Coordinator	2024 - 2026	Ongoing	FY24 - 25 —Develop plan to disseminate the scholarship within the <i>JAH</i> across more accessible and different formats. FY25 - 26 —Develop a strategy to expand and commodify digital humanities projects.



Goal 1. continued - Make AHS the most trusted authority on Arizona history.

Strategy 4. Become the “go-to” place for educators and students interested in Arizona’s history.					
Action Step	Priority	Person/s	Year	Status	Methodology
Expand the reach and impact of Arizona National History Day.	High	VP of Education With support of: MarComm staff	2024 - 2026	Ongoing	<p>Prioritize recruitment of new schools, teachers, historians, and college students participating in support of NHD.</p> <p>FY24—Develop catalog of classroom materials that explain to students and teachers what skills can be developed by NHD and how to develop those skills.</p> <p>FY24—Work with MarCom to develop evergreen NHD promotional materials to distribute across the state.</p> <p>FY24 -25—Recruit schools to participate 1-3 teachers per school, per year in NHD.</p> <p>FY25—Re-energize the teacher advisory board to do market research about what they need to implement NHD in their classroom.</p> <p>FY25 - 26—Expand recruitment of NHD participation to charter schools, Montessori schools, and homeschool groups.</p>
Grow annual educational attendance (non-NHD) to 1,800 by EOY FY26.	Mid	VP of Education With support of: MarComm staff	2024 - 2026	Ongoing	<p>FY24—Work with MarCom to develop promotional materials for widespread distribution.</p> <p>FY24 - 25—Coordinate with and advise other departments on how AHS content across the agency can be utilized by students and teachers.</p> <p>FY24 - 26—Develop variable grades 1-12 education content to support tours and activities at each AHS museum (align with state standards).</p>

Goal 1. continued - Make AHS the most trusted authority on Arizona history.

Strategy 4. Become the “go-to” place for educators and students interested in Arizona’s history.					
Action Step	Priority	Person/s	Year	Status	Methodology
Create dedicated educational lessons for grades K-12 and beyond, incorporating a pedagogy of “deep engagement” and tactile learning.	High	VP of Education Education staff With support of: MarComm staff Archivists (all)	2024 - 2026	Pending	<p>FY24—Identify applicable state standards for grades 1-12 curricula at AHS museums, and develop a list of potential topics/resources for relevant lessons. Develop and test two lessons (unique within grades 1-6) for AHS museums.</p> <p>FY25—Complete development and test lessons for grades 1-6 at AHC and AHM museums. Complete 2 grades within 1-6 at Sanguinetti House and Pioneer Museum.</p> <p>FY25—Create an online library of class lessons in a variety of subjects for different grade levels. These lessons can be recorded, or done live and then promoted to schools over the State. Other institutions can become part of this partnership and add content to be approved by staff.</p> <p>FY26—Complete development and test lessons for grades 1-6 at all AHS museums. Review project to-date and set updated timeline for grades 7-12 development and implementation.</p> <p>FY26—Working with MarComm, develop educational video series for students and for teacher professional development.</p>

Goal 1. continued - Make AHS the most trusted authority on Arizona history.

Strategy 4. Become the “go-to” place for educators and students interested in Arizona’s history.					
Action Step	Priority	Person/s	Year	Status	Methodology
Expand educational offerings to include lesson plans that place STEM subjects in historical context for use in multiple classroom and grade settings.	Mid	VP of Education Education staff	2024 - 2026	Pending	FY24 —Consult with STEM teachers to understand their needs and state standards, and applications within a historical context. FY25 - 26 —Implement STEM applications into grades 1-12 lesson plans.
Expand and market physical and digital learning resources for educators and students.	Low	Museum Education Curator (Tempe) With support of: MarComm staff	2024 - 2026	Ongoing	Ongoing —Create at least 4 new traveling museum kits each year, accommodating grade-specific and lesson-specific inquiries (e.g. Museum in a Box, Traveling Trunk). FY24 —Consult with teachers at various levels to understand their needs and develop a list of themes or topics. FY25 —Collaborate with MarCom to create promotional materials that engage teachers.
Expand school and educator engagement.	Mid	VP of Education Development Director	2024 - 2026	Ongoing	FY24 - 25 —Join professional development opportunities at districts. Push into schools in-service days to promote AHS services and resources. FY24 - 25 —Create development opportunities for teachers (e.g. ELA research skills lessons, NHD prep mentorship, grant writing for visits/programs). FY24 - 26 —Build and maintain relationships with school superintendents and district-level social studies specialists. FY24 - 26 —Expand educational services reach to charter schools, Montessori schools, and homeschool groups.

Goal 1. continued - Make AHS the most trusted authority on Arizona history.

Strategy 5. Pursue relevant certifications, recognitions, and awards.					
Action Step	Priority	Person/s	Year	Status	Methodology
Maintain AAM accreditation.	High	Executive Director	2025 - 2026	Ongoing	<p>FY25—Ensure thorough knowledge of AAM accreditation standards by relevant staff.</p> <p>FY26—Develop benchmark plan for ensuring AHS is capable of achieving re-accreditation in 2031.</p>
Participate in panels and presentations for regional and national conferences.	Mid	Senior Leaders (all)	2024 - 2026	Ongoing	<p>FY24 - 25—Incentivize staff to promote their work and/or share their expertise at conferences, and to support their own ongoing education and industry awareness.</p> <p>FY24 - 26—Establish a sustainable budget for staff travel to regional and national conferences.</p>



Goal 1. continued - Make AHS the most trusted authority on Arizona history.

Strategy 6. Develop Membership to be an engaged and inspired community partner.

Action Step	Priority	Person/s	Year	Status	Methodology
Grow AHS memberships to 1,500 annually by EOY FY26.	Mid	Membership Coordinator	2024 - 2026	Ongoing	<p>FY24—Implement new membership pricing levels, to include digital-only vs printed membership rates.</p> <p>FY24 - 25—Research and publish strategy to inspire new subscriptions and updates to existing membership levels (e.g. individual to steward or ambassador), with consideration of the campaigns of other cultural institutions.</p>
Explore the possibility of an expanded and enhanced members-only and general subscribers newsletter.	Mid	Executive Director Assistant Director: Development Membership Coordinator VP of Publications	2024 - 2026	Pending	<p>FY24—Initiate review of comparative cultural institutions statewide and nationally, and develop budgeted initiative for implementation at AHS.</p> <p>FY25 - 26—Secure initiative funding and implement; add impact data to existing monthly and annual reports.</p>

Goal 1. continued - Make AHS the most trusted authority on Arizona history.

Strategy 6. Develop Membership to be an engaged and inspired community partner.					
Action Step	Priority	Person/s	Year	Status	Methodology
Enhance value of membership through new exclusive membership events and perks that meet or exceed industry standards.	High	Assistant Director: Development Membership Coordinator Communications Manager	2024 - 2026	Pending	<p>FY24—Work across teams to ensure that all AHS teams are aware of the importance of members and encourage all teams to help with members-only initiatives.</p> <p>FY24—Survey the membership to understand what would help keep them engaged.</p> <p>FY24—Develop a list of comps from other similar cultural institutions, both within Arizona and outside.</p> <p>FY24 - 25—Explore current membership and member discount rates (e.g. gift shop, event tickets) and possible increases.</p> <p>FY25—Develop out the “members-only” section of the AHS website with additional resources and content.</p> <p>FY25 - 26—Develop and test new members-only content and activities, such as guided tours and major donor recognition events.</p> <p>FY25 - 26—Standardize members-only content and activities, and set to a regular and recurring schedule.</p>
Encourage volunteerism among members.	Mid	Assistant Director: Development Membership Coordinator	2024 - 2026	Ongoing	<p>FY24—Develop a list of volunteer opportunities especially targeted for members.</p> <p>FY24 - 26—Integrate into existing outreach channels for widespread and recurring distribution.</p>

Goal 1. continued - Make AHS the most trusted authority on Arizona history.

Strategy 6. Develop Membership to be an engaged and inspired community partner.

Action Step	Priority	Person/s	Year	Status	Methodology
Engage with different communities to ensure diversity in demographics, region, and age, among other things, among the AHS membership.	High	Assistant Director: Development Membership Coordinator	2024 - 2026	Ongoing	<p>Current membership is known to be primarily older and educated individuals/families.</p> <p>FY24—Identify potential areas of growth for AHS membership program (e.g. colleges, NHD families, AZ teachers).</p> <p>FY24 - 25—Execute and complete a “Know thyself” membership survey to best understand AHS’ brand, message, and recognized successes, and missed opportunities.</p> <p>FY25—Implement results of membership survey to develop a plan for ways to reach communities that AHS has not traditionally served</p>



Goal 2. - Enhance AHS' capacity to collect, preserve, interpret, and disseminate Arizona's history.

Strategy 1. Concentrate collections and archives acquisitions and stewardship on high-utility, mission-based items.					
Action Step	Priority	Person/s	Year	Status	Methodology
Identify areas of deficiency in existing 3D and archival coverage, and future acquisitions and stewardship goals.	High	Assistant Director: Mission State Curator Archivists (all)	2024	Pending	<p>FY24—Establish and codify methodology, vocabulary (e.g. “utility”), tracking parameters and metrics, and procedures for evaluation of holdings, gaps, and goals.</p> <p>FY24 - 25—Publish a brief description of the current historical/thematic coverage of collections & archives, gaps to be filled, and guidance to direct current/future areas of interest for acquisition.</p> <p>FY25—Update 2019 Collections Plan to reflect findings, with a focus on clarity of language for staff and donors.</p>
Remove items from collections that do not directly relate to mission and items that have low utility.	High	Assistant Director: Mission State Curator	2024 - 2026	Ongoing	<p>FY24 - 25—Continue to systematically inventory collections that align with suggestions from Sunset Review and AAM.</p> <p>FY25 - 26—Prioritize review of oversized objects over smaller items for potential deaccession. Reiterate commitment to consider/include regional Chapters/Support Groups as designated recipients of deaccessioned materials, to support auction/fundraising efforts.</p>
Actively collect high-utility items with strong provenance, research and reference, exhibit, and programming use.	Low	Assistant Director: Mission State Curator Archivists (all)	2024 - 2026	Ongoing	<p>FY24 - 26—Increase targeted solicitation for objects to fill in gaps in collections and archives.</p>

Goal 2. continued - Enhance AHS' capacity to collect, preserve, interpret, and disseminate Arizona's history.

Strategy 2. Optimize collections and archival storage spaces to properly preserve materials.

Action Step	Priority	Person/s	Year	Status	Methodology
Investigate shelving options (e.g., compact or high-bay) and additional storage options (e.g., off-site).	Mid	Executive Director Assistant Director: Mission	2024 - 2026	In Progress	FY24 - 25 –Identify and solicit organizations with changing needs to donate suitable shelving for collections & archives storage. FY25 - 26 —Install and/or begin construction on the project if shelves are secured.
Strategize expansion strategies for off-site or add-on storage.	Mid	Executive Director Assistant Director: Mission State Curator	2024 - 2026	Ongoing	FY24 - 26 —See Goal 5: Strategy 4.

Goal 2. continued - Enhance AHS' capacity to collect, preserve, interpret, and disseminate Arizona's history.

Strategy 3. Optimize collections and archival records and access.					
Action Step	Priority	Person/s	Year	Status	Methodology
Maintain paper and digital accession records for a 1:1 correlation with their respective item.	Mid	Assistant Director: Mission State Curator Archivists (all)	2024 - 2026	Ongoing	<p>FY24—Publish a joint collections-archives assessment of current record-keeping in its completeness (internal and public), progress made since 2013, and estimated timeline to completion.</p> <p>FY24 - 26—Maintain a regular schedule for the processing, accessioning, and care of new collections and archives. Add digitized records to AHS' online catalogs.</p>
Continue digitization of AHS archives content – finding aids and primary source documents – for online access.	Mid	Assistant Director: Mission Archivists (all) With support of: Education staff (to help identify priorities)	2024 - 2026	Pending	<p>Note: digitization of AHS assets is currently possible. Public dissemination and access to all digital assets is not possible with existing software subscriptions.</p> <p>FY24—10 linear feet of collections processed. 2 number of collections digitized.</p> <p>FY25—10 linear feet of collections processed. 2 number of collections digitized.</p> <p>FY26—10 linear feet of collections processed. 2 number of collections digitized.</p>
Develop a Digital Asset Management System (DAMS) to collect, manage, and preserve internal digital records and digital-born materials.	High	Assistant Director: Mission Archivists (all) Development Director	2024 - 2026	Pending	<p>FY24 - 25—Solicit donations/sponsorship for a Digital Asset Management System (DAMS) for Library & Archives, and recurring annual subscription fees.</p> <p>FY25 - 26—Pending DAMS funding, enact data migration; content creation onto the new platform can begin.</p>

Goal 2. continued - Enhance AHS' capacity to collect, preserve, interpret, and disseminate Arizona's history.

Strategy 3. Optimize collections and archival records and access.

Action Step	Priority	Person/s	Year	Status	Methodology
Expand AHS online collections catalogs with new records and supporting materials.	Mid	Assistant Director: Mission State Curator Archivists (all)	2024	Ongoing	FY24 - 26 —Update catalog records upon acceptance of new collections/archives, and during inventory or re-processing of existing collections/archives.
Market AHS' online catalogs of objects and archives.	Low	Assistant Director: Mission MarComm staff	2024 - 2025	Pending	FY24 - 25 —Working with MarComm, develop a strategy to promote archives/collections services and holdings.



Goal 3. - Develop experiences that are meaningful and relevant to today’s audiences.

Strategy 1. Conduct studies of the guest experience at each AHS location.					
Action Step	Priority	Person/s	Year	Status	Methodology
Identify core and emerging audiences, organizations, and groups across Statewide communities	Mid	Assistant Director: Development MarComm staff Outreach Committee	2024 - 2026	Pending	FY24 - 26 —Identify and attend/participate in local community events and dialogues around each AHS museum location (e.g. Chambers of Commerce meetings & mixers, cultural celebrations, local Boards). FY25 - 26 —Seek assistance and additional input through Outreach Committee’s community initiatives (“Town Hall” meetings, CHI mixers, etc).
Conduct community polling on relevant and “hot topics” in history.	Mid	Assistant Director: Development GE staff With support of: Development Director	2024 - 2026	Ongoing	FY24 —Visitor polling across all AHMS museum locations, to identify community needs and interests. FY24 - 26 —Explore additional ways to solicit feedback and community dialogues from within local communities directly.

Goal 3. continued - Develop experiences that are meaningful and relevant to today's audiences.

Strategy 1. Conduct studies of the guest experience at each AHS location.

Action Step	Priority	Person/s	Year	Status	Methodology
Identify opportunities to enhance guest experiences in ways that are relevant, implementable, and impactful.	High	Assistant Director: Mission Assistant Director: Development Development Director GE staff	2024 - 2026	Ongoing	<p>FY24—Review “conversation questions” to expand fields for engagement-focused polling.</p> <p>FY24—Develop clear evaluation materials and criteria for all AHS public events; consider performance metrics of other, similar in-region events.</p> <p>FY24—Conduct evaluation of current programs and determine events calendar for 2024 (Jan-Dec) by October 2023. Establish a core process in perpetuity.</p> <p>FY24 - 26—Secure annual donors/sponsors for recurring event series (streamline + simplify partner recruitment/management process)</p> <p>FY25 - 26—Implement program and events calendars.</p>

Strategy 2. Develop innovative, engaging, and immersive exhibition content.

Action Step	Priority	Person/s	Year	Status	Methodology
Publish a methodological strategy to establish future exhibition standards.	High	Assistant Director: Mission Head of Exhibits	2024	Pending	<p>FY24—Publish a statement of methodological mission, standards, and practices. This report is to include an evaluation of the standards & practices of other state and national museums and museum organizations.</p>

Goal 3. continued - Develop experiences that are meaningful and relevant to today’s audiences.

Strategy 2. Develop innovative, engaging, and immersive exhibition content.					
Action Step	Priority	Person/s	Year	Status	Methodology
Create and promote a revolving slate of temporary and pop-up exhibits that are available to statewide organizations.	Mid	Assistant Director: Mission Head of Exhibits	2024 - 2026	Ongoing	October (annually) – Determine exhibition schedule for following calendar year, with focus on Q1-2 and Q3-4 divisions, and consideration of high-tourism seasons at each respective museum. FY24 - 26 —Work with Chapters and Support Groups, as well as new/identified community partners, to solicit feedback and input on the coordination of seasonal exhibit schedules.
Work with community partners to develop dynamic in-agency exhibitions and content, and AHS’ support of in-community exhibitions and content.	Mid	Assistant Director: Mission Head of Exhibits Exhibit Curator	2024 - 2026	In Progress	FY24 - 26 —Identify and consolidate community partners for consideration in development of succeeding year’s exhibition content.
Develop opportunities for traveling exhibits, including previous AHS temporary exhibits.	Low	Assistant Director: Mission Head of Exhibits Exhibit Curator	2024 - 2026	In Progress	FY24 —Identify and develop materials for past AHS exhibits which may be commercialized for distribution. FY24 - 25 —Identify potential distribution partners, including CHIs. FY25 - 26 —Complete first AHS traveling exhibit with identified partner organization.

Goal 3. continued - Develop experiences that are meaningful and relevant to today's audiences.

Strategy 2. Develop innovative, engaging, and immersive exhibition content.					
Action Step	Priority	Person/s	Year	Status	Methodology
Update technologies and ADA access to all AHS exhibits (permanent and temporary).	Mid	Assistant Director: Operations Exhibits staff	2024 - 2026	Pending	FY24 —Complete exhibits survey to identify all outdated/damaged equipment and recommended replacement content. Highlight potential improvements, including new modes of engagement & exploration through supporting technology. Ready budget proposal and solicit funding beginning in Q4. FY25 - 26 —Secure funding and implement phased upgrades and improvements.
Develop paired online content with all AHS exhibitions, and ensure community and partner access and promotion.	Mid	Assistant Director: Mission VP of Education Assistant Director: Development Communica- tions Manager	2024 - 2025	Ongoing	FY24 - 25 —Participate in website redesign talks to ensure fulfillment of function and needs for hosting online content, with added consideration of members-only sections. FY25 - 26 —Establish virtual content development into the planning schedule for physical exhibits each October. Engage Marketing to ensure partner tie-ins and cross-promotion.
Create unique online exhibitions.	Low	Assistant Director: Mission Head of Exhibits Archivists (all)	2025 - 2026	Ongoing	FY25 - 26 —Establish operational guidelines to partner original and supporting virtual content with the planning schedule for physical exhibits. To be completed June annually for the following year.

Goal 3. continued - Develop experiences that are meaningful and relevant to today's audiences.

Strategy 2. Develop innovative, engaging, and immersive exhibition content.					
Action Step	Priority	Person/s	Year	Status	Methodology
Develop a permanent outdoor exhibition space in the Molina Block, Yuma.	High	Executive Director Assistant Director: Mission Head of Exhibits Assistant Director: Operations YCHS	2024 - 2026	In Progress	FY24 —Complete solicitation of design-build firms by YCHS and AHS; funding secured and contract awarded. FY25 - 26 —Execute contract and work within assigned schedule.
Strategize and develop a major update to AHS' permanent exhibits.	Low	Assistant Director: Mission Head of Exhibits With support of: Development Director Exhibits Curator Archivists (all) Curation staff	2024 - 2026	Pending	FY24 —All museums: Complete exhibits survey to identify outdated/broken content. FY24 —All museums: assess exhibit themes and desired messages (with consideration of available collections). FY24 - 25 —AHC Tempe, Sanguinetti House: Recommend replacement content and develop a draft budget. FY25 —Sanguinetti House: Complete development of planned exhibit content. FY25 - 26 —AHC Tempe: Solicit design-build firms for budgeting and design purposes. Develop phased implementation strategy. Engage Board and Development in planned fundraising. FY25 - 26 —AHC Tempe: Work to secure funding. If realized, execute the contract and work within the assigned schedule.

Goal 3. continued - Develop experiences that are meaningful and relevant to today's audiences.

Strategy 3. Develop activities that promote AHS services and resources.					
Action Step	Priority	Person/s	Year	Status	Methodology
Grow visitation and engagement at all 4 AHS museums to 65,000 annually by EOY FY26.	Mid	Executive Director Assistant Director: Mission VP of Education Assistant Director: Development	2024 - 2026	In Progress	<p>FY24—Expand opening hours of all AHS museums.</p> <p>FY24 - 26—Develop new and recurring public content to attract new visitors and inspire repeat attendance.</p> <p>FY24 - 26—Expand and strengthen community partners for greater regional reach.</p> <p>FY25—MarComm & GE to research and publish a statewide survey of other cultural organizations' outreach initiatives toward visitor growth.</p>
Increase online presence by adding more digital programming and recurring social media content, such as behind-the-scenes tours and staff spotlight videos.	Low	Assistant Director: Development Membership Coordinator Archivists (all) State Curator History Engagement Coordinator Development Director	2024 - 2026	In Progress	<p>FY24 - 26—Share digital content with all AHS locations, CHIs and outreach to statewide museums.</p> <p>FY24 - 26—Seek grant/donor/ sponsor support to contract for audio-video development of unique video content.</p>

Goal 3. continued - Develop experiences that are meaningful and relevant to today’s audiences.

Strategy 3. Develop activities that promote AHS services and resources.					
Action Step	Priority	Person/s	Year	Status	Methodology
Expand History Engagement program through participation in external community events, media appearances, guest speaker requests, op-eds, etc.	High	History Engagement Coordinator Communications Manager	2024 - 2026	In Progress	<p>FY24—1 community tabling or speaking event monthly; coordinate with Communications Manager to engage local news organizations and establish HEC as available for media appearances.</p> <p>FY25 - 26—1 community tabling and 1 speaking event monthly.</p> <p>FY25 - 26—Explore development of an “Arizona History Speakers Bureau ” with available speakers and pre-developed talks for an external contract.</p>
Develop on-site and in-community themed events and recurring family programs that celebrate Arizona’s history.	Mid	History Engagement Coordinator Communications Manager	2024 - 2026	In Progress	<p>Create a schedule of recurring programs at each museum to attract public interest and create a consistent, predictable new revenue stream. Prioritize development of recurring programs over one-off events.</p> <p>FY24 –1 quarterly/seasonal public event at each AHS location; test low-cost, high-impact recurring public programs (e.g. Pioneer craft days, quarterly “Family Days”).</p> <p>FY25 - 26 –1 quarterly/2 seasonal public events at each AHS location; consolidate recurring public programs</p>

Goal 4. - Establish AHS as a strong, recognizable brand.

Strategy 1. Build awareness of AHS' mission and vision.					
Action Step	Priority	Person/s	Year	Status	Methodology
Establish relationships with elected officials, educational institutions, and community leaders.	High	Executive Director Development Director Assistant Director: Development VP of Education	2024 - 2026	Ongoing	To include: CHIs, Support Groups, Chapters, city Chambers of Commerce, local universities (and subsequent departments), State Library & Archives, State Parks, National History Day, local schools and school districts. FY24 - 26 —Update key stakeholders mailing lists and establish direct contact through personal numbers or executive staff. FY24 - 26 —Secure early attendance and participation by local Legislators to AHS events and receptions, with focus on newly-elected individuals.
Engage Chapters, Boards, and partners to enhance regional awareness and initiatives.	Mid	Executive Director Development Director Assistant Director: Development	2024 - 2026	Pending	FY24 —Contracts finalized with all current Support Groups. FY25 - 26 —Establish clear and recurring joint marketing and fundraising initiatives
Promote identification of historic sites, museums, historic marker sites, and partners as entities within the AHS brand.	Mid	Assistant Director: Development	2024 - 2026	Pending	FY24 —Develop marketing strategy and cost to increase attendance at AHS museum (e.g. AHS site “passport”). FY24 - 26 —Launch marketing & evaluate at year’s end

Goal 4. continued - Establish AHS as a strong, recognizable brand.

Strategy 1. Build awareness of AHS' mission and vision.

Action Step	Priority	Person/s	Year	Status	Methodology
Expand marketing and advertising about AHS' programs, exhibits, publications, resources (i.e. collections, archives), and services across the state (and beyond).	High	Assistant Director: Development	2024 - 2025	Ongoing	<p>FY24—Develop quarterly events calendar series to advertise for new activities across AHS locations. This calendar should be available in both printed and digital form.</p> <p>FY24 - 25—Develop marketing materials for all AHS departments and services (printed and digital).</p> <p>FY24 - 26—Incorporate materials into the marketing strategy of Goal 4: Strategy 1, Action Step 3.</p>



Goal 4. continued - Establish AHS as a strong, recognizable brand.

Strategy 2. Align internal AHS policies and documentation under a single, state-wide structure.

Action Step	Priority	Person/s	Year	Status	Methodology
Develop key terminology and policy statements for agency-wide use.	Mid	Executive Director Assistant Director: Mission Assistant Director: Operations Executive Staff Assistant With support of: VP of Finance Development Director Grants Coordinator History Engagement Coordinator Sales & Marketing Manager	2024 - 2026	In Progress	FY24 - 25 —To develop: Donor and Sponsor solicitation/receipt, Volunteer materials, funds management (internal operations, Support Groups, etc.), grant writing protocol, event planning procedures, event rental procedures. FY25 - 26 —To develop/update: Emergency Management Plan, Collections management & accession/deaccession policies, Historic Preservation and Stewardship statements, DEI statement, Land Acknowledgement statement.
Engage staff and external partners to develop a strong sense of unified AHS identity.	Mid	Assistant Director: Development Development Director VP of Education	2024 - 2026	Ongoing	Develop recurring joint programs, both within AHS and through tabling at others' events. FY24 - 26 —Establish an annual calendar of recurring partnered programs, and criteria for evaluating additional one-offs.

Goal 4. continued - Establish AHS as a strong, recognizable brand.

Strategy 2. Align internal AHS policies and documentation under a single, state-wide structure.

Action Step	Priority	Person/s	Year	Status	Methodology
Develop, modify, and maintain performance and financial reporting metrics to recognize department initiatives and reflect AHS as a single entity.	High	VP of Finance	2024 - 2026	In Progress	<p>FY24—Develop regular monthly financial reports, demonstrating YTD and calibrated to reflect a department/activity-based operational focus.</p> <p>FY24—Complete updates to AHS Investment funds and annual budget, with respect to sub-fund allocations.</p> <p>FY24—Expand monthly reports to include YTD of and actions to Investment Funds.</p> <p>FY24 - 26—Evaluate CSB contractual services to support development of regular and annual reports, offsetting personnel costs.</p> <p>FY24 - 25—Create specific Strategic Plan Reports in Agile to easily track progress in reaching goals.</p>



Goal 4. continued - Establish AHS as a strong, recognizable brand.

Strategy 3. Develop a unified marketing strategy.					
Action Step	Priority	Person/s	Year	Status	Methodology
Standardize use of Arizona Historical Society, logo, colors, and aesthetic design as "The Brand."	Mid	Assistant Director: Development	2024 - 2026	In Progress	<p>FY24—Complete agency-wide update of logo across social media and marketing materials.</p> <p>FY24—Centralize promotional development under Marketing to ensure standards control.</p> <p>FY24—Identify outdated logo among distributed or developed materials (exhibits, partner websites, branded merchandise, etc) and begin to phase out</p> <p>FY24—Establish network and procedure for any/all future updates.</p> <p>FY24 - 26—Develop and implement social media policy/strategy to address any types of engagement across all media platforms/in PR situations.</p>
Establish objectives and an annual budget for digital, broadcast, and published advertising and outreach across state and local markets.	High	Assistant Director: Development VP of Finance	2024 - 2026	Pending	<p>FY24—Identify key effective marketing media for paid advertising and solicit competitive quotes.</p> <p>FY24 - 25—Establish impact goals and tracking/reporting procedures.</p> <p>FY25 - 26—Contract services for evaluatory period.</p>
Develop clear "identities" and "voices" in online media to thematically engage diverse audiences across current and future platforms.	Mid	Communica- tions Manager	2024 - 2026	In Progress	<p>FY24—Develop written strategy identifying promotional media and outlets, principal contacts, and the tone and type of content submitted across each.</p> <p>FY25 - 26—Develop core, continuing content and explore additional expansions (e.g. "This Day in History" daily email), including assignment of content contributors and expectations.</p>

Goal 4. continued - Establish AHS as a strong, recognizable brand.

Strategy 3. Develop a unified marketing strategy.					
Action Step	Priority	Person/s	Year	Status	Methodology
Establish universal AHS membership branding.	Low	Membership Coordinator	2024 - 2026	In Progress	<p>FY24 - 25—Identify materials and activities warranting a membership presence and establish protocols for consistent implementation.</p> <p>FY24 - 26—Establish clear language and associated graphics.</p>
Develop signature programming, including online, public, fundraiser, and Development events.	Mid	History Engagement Coordinator Development Director Assistant Director: Development	2024 - 2026	Ongoing	<p>FY24—One signature event per quarter at AHM Tucson and AHC Tempe, expanded focus on low-cost/high-impact free weekend activities at all museums, 1-2 Development events per quarter across AHS sites.</p> <p>FY25 - 26—New monthly and quarterly public events at AHM Tucson and AHC Tempe.</p>
Develop core marketing strategy and documentation for each department, facility, and activity at AHS.	Mid	Assistant Director: Development With support of: Senior leaders (all)	2024 - 2025	Pending	<p>FY24 - 25—Identify and establish effective networks and media for AHS' respective departments and services.</p> <p>Materials to include cost sheets, service/program descriptions, promotional photos, and supporting contact/booking infrastructure.</p>

Goal 4. continued - Establish AHS as a strong, recognizable brand.

Strategy 4. Ensure easy access to AHS news, activities, and updates.

Action Step	Priority	Person/s	Year	Status	Methodology
Update AHS website with greater focus on user accessibility and functionality.	Low	Assistant Director: Development Communica- tions Manager Development Director	2024 - 2025	Pending	FY24 —Identify and solicit vendors, and establish a budget. FY25 - 26 —Secure funding or establish financial strategy for future development.
Update POS for easier visitor purchases and staff management.	High	Assistant Director: Operations GE staff Executive Staff Assistant	2024 - 2026	Pending	FY24 —Identify and solicit vendors, and evaluate options. FY25 - 26 —Ensure improved front-end UI and integration into supporting software (DonorPerfect, EventPro360).
Update event management policies to reflect best-use software and practices.	High	Sales & Marketing Manager Assistant Director: Operations Executive Staff Assistant	2024 - 2025	In Progress	FY24 —Upgrade EventPro360 software, expanding to all AHS museums. FY24 —Consolidate and standardize documentation and management procedures to ensure compliance. FY24 - 25 —Migrate booking, contracts, planning, and payment systems to EventPro360 software.
Develop seasonal calendars and one-off graphics, online event pages, and other supporting media for all AHS events (distinguishing public vs private offerings).	Mid	Communica- tions Manager	2024 - 2026	Pending	FY24 —Consolidate internal list of annual and seasonal events across AHS sites. FY24 —Establish seasonal production and distribution schedule for associated media. FY24 - 26 —Maintain clear request and fulfillment processes for department submissions, and ensure buy-in.

Goal 4. continued - Establish AHS as a strong, recognizable brand.

Strategy 4. Ensure easy access to AHS news, activities, and updates.					
Action Step	Priority	Person/s	Year	Status	Methodology
Maintain active dialogues with local, regional, and statewide news outlets, including newspapers, television, radio, and podcasts.	Mid	Communications Manager	2024 - 2026	Ongoing	<p>FY24 - 26—Identify and maintain contact lists for key reporting outlets.</p> <p>FY24 - 26—Encourage on-site attendance and reporting of newsworthy events and activities.</p> <p>FY24 - 26—Develop recurring dialogues to identify AHS staff as knowledgeable experts for reference/interview</p>
Maintain active mailing lists to include Statewide elected officials, local Chambers of Commerce, educators, and key business and community stakeholders.	Mid	Assistant Director: Development	2024 - 2026	Ongoing	<p>FY24—Update key stakeholders mailing lists and establish direct contact through personal numbers or executive staff.</p>



Goal 5. - Enhance financial resources to advance AHS' mission and ensure long-term sustainability and growth.

Strategy 1. Diversify revenue streams to reduce dependence on appropriated funds.

Action Step	Priority	Person/s	Year	Status	Methodology
Retain a Development Director to manage growth-based initiatives.	High	Development Director	2024 - 2026	Ongoing	<p>Development Director hired in summer 2022. Looking ahead, to focus on supporting existing programs/needs, not new projects.</p> <p>FY24—\$150,000 raised annually in direct donations to support stated Strategic Plans & goals.</p> <p>FY24—Secure annual & recurring donations/sponsorship for AHS events and programs (shift from individual event donors).</p> <p>FY25 - 26—\$200,000 raised annually.</p>
Develop a planned giving program.	Low	Development Director Membership Coordinator	2024 - 2026	Ongoing	<p>FY24—Outreach documents and core financial systems/ controls completed and installed.</p> <p>FY25 - 26—Establish a planned giving program and strategy to develop \$25,500+ donations annually, with focus on estate planning and \$1m+ gifts (cash, property, etc).</p>
Develop a grant-writing program, growing grants awarded annually to a sustainable \$250,000 by EOY FY26.	High	Grants Coordinator	2024 - 2026	Ongoing	<p>Grants Coordinator hired spring 2022. Looking ahead, to focus on supporting existing programs/needs, not new projects.</p> <p>FY24—\$150,000 raised in awarded grants.</p> <p>FY25 - 26—\$250,000 raised in awarded grants.</p>

Goal 5. continued - Enhance financial resources to advance AHS' mission and ensure long-term sustainability and growth.

Strategy 1. Diversify revenue streams to reduce dependence on appropriated funds.

Action Step	Priority	Person/s	Year	Status	Methodology
Develop a high-functioning 501(c)3 partner for stewardship of gifts.	Mid	Executive Director	2024 - 2026	Ongoing	<p>FY24—Explore the capacity of Friends of AHS (FAHS) to serve as designated partner.</p> <p>FY24—Complete Support Group contracts with qualifying/designated parties, with included provisions to secure and align financial management practices.</p> <p>FY24 - 26—Explore capacity of other Support Groups to provide local repositories for region-specific funding (e.g. YCHS and Molina Block).</p>

Strategy 2. Maximize existing earned income streams and develop new earned income streams.

Action Step	Priority	Person/s	Year	Status	Methodology
Develop merchandising/ cross-promotional opportunities with other AHS operations.	Mid	Assistant Director: Development With support of: Sales & Marketing Manager Executive Director	2024 - 2026	Pending	<p>FY24—Utilize Master Calendar to explore thematic periods (months, quarters) around which to align corresponding content/activities.</p> <p>FY25 - 26—Establish clear reporting processes for departments on upcoming events, exhibits, or initiatives, with needs or opportunities for upsells.</p>

Goal 5. continued - Enhance financial resources to advance AHS' mission and ensure long-term sustainability and growth.

Strategy 2. Maximize existing earned income streams and develop new earned income streams.

Action Step	Priority	Person/s	Year	Status	Methodology
Grow Gift Shop sales to \$60,000 by EOY FY26.	Mid	Assistant Director: Operations GE staff Executive Staff Assistant	2024 - 2026	Pending	<p>FY24—Enact review of current Gift Shop items and POS with a focus on branded items and popular items for tourism.</p> <p>FY24—Establish clear processes for maintenance and evaluation of gift shop operations.</p> <p>FY25—Establish gift shop operations strategy, to include growth and development, performance tracking analytics, preferred vendors, region-specific themed content, branded items strategy, and “big ticket” items.</p> <p>FY25 - 26—Rebuild and strengthen AHS online gift shop.</p>
Grow Event Rental sales to \$275,000 by EOY FY26.	Mid	Sales & Marketing Manager Program Project Specialist	2024 - 2026	In Progress	<p>FY24—Refine rental contracts and pricing packages.</p> <p>FY24 - 25—Streamline internal processes and simplify online forms and e-signing of documents.</p> <p>FY25—Expand marketing and promotional outreach with local partners (ongoing).</p>
Grow Paid Program sales to \$100,000 by EOY FY26.	Mid	Assistant Director: Development Development Director	2024 - 2026	In Progress	<p>FY24 - 25—Establish 1 signature fundraising event for each AHS museum, generating \$15-20k at both AHC Tempe and AHM Tucson (e.g. Tastes, Toasts, Tales, Drinking Local).</p> <p>FY25 - 26—Expand signature fundraising events to 2 per museum, generating \$25-30k at each location.</p>

Goal 5. continued - Enhance financial resources to advance AHS' mission and ensure long-term sustainability and growth.

Strategy 2. Maximize existing earned income streams and develop new earned income streams.

Action Step	Priority	Person/s	Year	Status	Methodology
Grow Admissions sales to \$150,000 by EOY FY26.	High	Executive Director Assistant Director: Development Assistant Director: Operations GE staff	2024 - 2026	Pending	FY24 —Expand free and recurring public content and events to build loyalty and inspire repeat visitation. FY25 —Enact review of AHS pricing and cost value. FY25 - 26 —Enact review of AHS pricing and cost value.

Strategy 3. Update AHS budget and Investment funds to align with best practices and Strategic Plan.

Action Step	Priority	Person/s	Year	Status	Methodology
Align funding allocations and expenditure reports in the annual budget to reflect departmental and operational needs.	Mid	VP of Finance	2024	In Progress	FY24 —Work with AHS Finance Committee to design desired report format. FY24 —Engage with CSB to represent new formatting foci in monthly reports.
Reallocate Investment Funds to accurately reflect and discern operational reserves, awarded grants, and restricted accounts toward select departments/ activities.	High	VP of Finance	2024	In Progress	FY24 —Engage CSB to complete submittals to GAO to authorize reallocation of funds. FY24 —Update monthly reports to include YTD and current activity of funds.

Goal 5. continued - Enhance financial resources to advance AHS' mission and ensure long-term sustainability and growth.

Strategy 4. Develop a strategic plan for long-term facilities care and future-capacity needs.

Action Step	Priority	Person/s	Year	Status	Methodology
Identify and prioritize development needs for AHS facilities, with particular attention to AHC Tempe and AHM Tucson, and historic properties.	High	Executive Director AHS Board President	2024 - 2025	In Progress	<p>FY24—Procure services of Special Projects Manager to oversee design/implementation of strategic plan.</p> <p>FY24—Define scope of work (vision, profile, and budget) for a new archives annex to AHC Tempe and explore all options for AHM Tucson.</p> <p>FY24—Submit CIP proposals for new construction at AHC Tempe, AHM Tucson (note: 2 year lead for FY26).</p> <p>FY24 - 25—Develop strategic plan outlining processes for funding, timeline, and identified partners. Develop draft agreements and contracts in support of proposed scope of work.</p>
Identify internal solutions and external partners to lead and maintain development efforts.	Mid	Executive Director Development Director AHS Board President Special Projects Manager	2024 - 2025	In Progress	<p>FY24—Identify and secure regional and state partnerships, both to support development efforts and in a funding capacity.</p> <p>FY25—Codify support with firm commitments with precise dollar amounts.</p>

Goal 5. continued - Enhance financial resources to advance AHS' mission and ensure long-term sustainability and growth.

Strategy 4. Develop a strategic plan for long-term facilities care and future-capacity needs.					
Action Step	Priority	Person/s	Year	Status	Methodology
Establish clear financial and handling practices, including donor management and recognition.	Mid	Executive Director VP of Finance Development Director Communications Manager Special Projects Manager	2024 - 2025	Pending	FY24 —Develop marketing materials, receipts of charitable donations, funding reports, investment strategy, and reporting procedures. FY25 —Establish escrow/donation/gifting protocols and supporting Financial management.
Develop singular and recurring funding streams to sustainably address AHS' operational and initiative-based needs.	Low	Development Director Special Projects Manager	2025 - 2026	Pending	FY25 —Establish estimated budget for annual operations of new/improved facility projects. FY25 - 26 —Transition new project-support from confirmed partners to recurring support, seeking annual donations. FY25 - 26 —Capitalize on existing networks to approach and engage new stakeholders with annual sponsorships.

Goal 5. continued - Enhance financial resources to advance AHS' mission and ensure long-term sustainability and growth.

Strategy 5. Involve affiliate organizations in the overall fundraising plan.

Action Step	Priority	Person/s	Year	Status	Methodology
Grow relationships with affiliate organizations.	Low	Executive Director Development Director Assistant Director: Development State Board Chapter representatives	2024 - 2026	Ongoing	FY24 —Identify key stakeholders within affiliate networks, and coordinate solicitation. FY25 —Establish financial reporting controls to demonstrate allocation of locally-raised funds to support local operations. FY25 - 26 —Establish partnered programs with clear delineations of responsibility and benefits.
Implement formal partnership contracts with AHS Support Groups.	High	Executive Director	2024 - 2025	In Progress	FY24 —Finalize contracts with YCHS and NAPHS, and any other identified Support Groups. FY24 - 25 —Identify and evaluate potential partners to address current coverage gaps in the Southern region.



Goal 5. continued - Enhance financial resources to advance AHS' mission and ensure long-term sustainability and growth.

Strategy 6. Develop a long-term strategy for AHS facilities and historic properties.					
Action Step	Priority	Person/s	Year	Status	Methodology
Establish a dedicated budget for the repair and annual preventative maintenance of AHS' historic sites.	Mid	Executive Director Assistant Director: Operations Facilities Coordinator Buildings & Properties Chair	2024 - 2026	Pending	<p>FY24—Conduct engineering surveys of all AHS historic properties, assessing current facility status and applicability of variable funding sources toward improvements.</p> <p>FY24 - 25—Solicit facility appraisals, and restoration and maintenance estimates, comparing against previous fiscal years, including use of contracted vendors.</p> <p>FY24 - 25—Establish a ranked schedule for restoration and repair of AHS historic properties/specific features.</p> <p>FY24 - 26—Update annual CIPs to reflect restoration & maintenance needs.</p> <p>FY24 - 26— Continue to work with ADOA for additional support.</p>
Establish an annual list of facilities/projects for priority care.	High	Executive Director Assistant Director: Operations Buildings & Properties Chair	2024 - 2026	Pending	<p>Align internal schedule for facility/site repairs/improvements with requests with CIP, ADOA, other state agencies, and regional/state other partners.</p> <p>FY24—Establish clear submission timelines for annual state and third-party submissions.</p> <p>FY24 - 25—Priorities: Molina Block (Yuma) & Douglas-Williams House (Douglas).</p> <p>FY25 - 26—Priorities: Charles O Brown House, Sanguinetti House, Pioneer Museum.</p>

Goal 5. continued - Enhance financial resources to advance AHS' mission and ensure long-term sustainability and growth.

Strategy 6. Develop a long-term strategy for AHS facilities and historic properties.

Action Step	Priority	Person/s	Year	Status	Methodology
Establish annual operating costs for AHS facilities statewide.	Mid	Assistant Director: Operations VP of Finance	2024	Pending	Collate annual expenses (planned, recurring, emergency) by location, and ensure representation in monthly financial reports; to include budgets for public initiatives, exhibit development, and facilities upgrades/repairs. FY24 —Conduct engineering surveys of all AHS museums, assessing current repair costs, necessary improvements and upgrades, and identifying annual maintenance needs.
Develop a restoration strategy and budget for Molina Block building in Yuma.	Mid	Executive Director Assistant Director: Operations Facilities Coordinator Communications Manager	2024 - 2026	In Progress	FY24 —Update 2019 engineering surveys to assess current restoration costs and identify annual maintenance needs. FY24 —Emphasize Molina Block stabilization/rehabilitation in annual CIP submission. FY24 - 26 —Evaluate regional, Legislative, Executive, and administrative support for restoration to develop a funding strategy and restoration schedule. FY25 —Develop use-plans and marketing materials to support fundraising and solicitation efforts.
Develop a strategy for AHM Tucson lease issue by no later than 2026.	Mid	Executive Director AHS State Board	2024 - 2026	In Progress	See Goal 5: Strategy 4.

Goal 5. continued - Enhance financial resources to advance AHS' mission and ensure long-term sustainability and growth.

Strategy 7. Optimize operations and seek reductions in cost.					
Action Step	Priority	Person/s	Year	Status	Methodology
Enhance the AHS volunteer corps and internships statewide.	High	Volunteer Coordinator Development Director	2024 - 2025	In Progress	<p>FY24—Finalize testing and development of revised Volunteer programs through one-off appointments.</p> <p>FY24—Launch revised Volunteer program, managing volunteer training, maintaining an active database of volunteers to be activated, and placing candidates with appropriate departments/activities.</p> <p>FY25—Secure supporting technology for volunteers (computers, IT access, etc).</p>
Develop an archive of clear and accessible resources for staff training and reference.	Mid	Assistant Director: Operations Volunteer Coordinator Executive Staff Assistant	2024 - 2025	In Progress	<p>FY24—Complete creation of AHS policies, practices, and procedures for staff instruction and use.</p> <p>FY24—Cleanup AHS Drive to remove duplicate/outdated files and manage access rights among users.</p> <p>FY24—Update “Core Documents” section of Drive and ensure staff training for its access and use.</p> <p>FY25—Explore and develop a staff portal on the AHS website for increased accessibility.</p>
Provide necessary IT resources and skills (infrastructure, hardware, software, training).	Mid	Assistant Director: Operations	2024 - 2026	Ongoing	<p>FY24—Complete planned IT refresh; identify all remaining IT deficiencies and include in updated state funding requests.</p> <p>FY25 - 26—Secure additional funding (Development, grants, ADOA, Investment Funds?) to upgrade all outstanding items.</p>

Goal 5. continued - Enhance financial resources to advance AHS' mission and ensure long-term sustainability and growth.

Strategy 7. Optimize operations and seek reductions in cost.

Action Step	Priority	Person/s	Year	Status	Methodology
Seek cost-sharing agreements with other State agencies.	Mid	Executive Director Assistant Director: Operations VP of Finance	2024 - 2026	Ongoing	<p>FY24—Complete audit of agency resource expenditures, either to demonstrate funding deficiencies or available cost-saving alternatives (e.g. CSB vs second accountant, Guest Experience staff vs NAU internship).</p> <p>FY24 - 26—Establish tracking documents to regularly record existing agreements and operational savings generated.</p> <p>FY24 - 26—Evaluate staff or shared-services-based options when considering contract vendors (e.g. website update, POS update).</p>



Goal 6. - Cultivate key partnerships across Arizona and beyond.

Strategy 1. Engage the regional networks of the AHS Board of Directors.					
Action Step	Priority	Person/s	Year	Status	Methodology
Visit non-AHS regional museums and societies, meet and greet, collect names and contacts and funnel to AHS for implementation.	Mid	Staff (all) State Board	2024 - 2026	Pending	FY24 —Collect data, contacts and other pertinent information to implement visits. FY25 —Move project forward after collecting data and setting dates for visits. FY26 —Analyze and quantify results for future outreach initiatives.
Plan future engagements, speakers, offerings from AHS. Coordinate with AHS staff to provide Board Members with speaking points.	Low	Assistant Director: Development History Engagement Coordinator Board Members	2024 - 2026	Pending	FY24 —Admin and Staff prepare board member to speaking points/training. FY25 —Ensure facilitation is adequate and the process is moving forward. FY26 —Gauge overall success and ongoing process.
Support AHS Legislative initiatives through contact campaigns to elected officials.	High	Executive Director	2024 - 2026	Ongoing	FY24 —Create campaign materials. Generate an updated contact list. FY24 - 25 —Solicit materials, follow-up with Officials contacted. Track responses. FY26 —Evaluate successes and continue with the campaign noting favorable outcomes.
Collaborate with individual board members on visitation to museums in their immediate regions.	Mid	Assistant Director: Development GE staff Outreach Committee	2024 - 2025	Pending	FY24 —Engage staff and additional member in thoughts and action plan to move forward. FY25 —Contact museums, set appointments. Realization of onsite visits. Create media releases with staff using photos, etc during visits. Staff post and track progress.

Goal 6. continued - Cultivate key partnerships across Arizona and beyond.

Strategy 1. Engage the regional networks of the AHS Board of Directors.

Action Step	Priority	Person/s	Year	Status	Methodology
Increase expectations of Board members to commit time and resources in support of AHS Committee initiatives and programs.	High	Senior Leaders (all) State Board	2024 - 2025	Pending	FY24 —Increase frequency of conversation and request for participation and recurring board action. FY25 —Realization of board participation and reportable results.

Strategy 2. Enhance partnerships with AHS Support Groups.

Action Step	Priority	Person/s	Year	Status	Methodology
Identify and develop mutual fundraising strategies.	Mid	Assistant Director: Development Grants Coordinator Outreach Committee	2024 - 2025	Pending	FY23 - 24 —Communicate with Staff & Outreach Comm. with ideas/discussion to direct drafting of strategic outreach plans. FY24 - 25 —Contact CHIs, regional AZ museums, and other identified partners to assess current needs and future opportunities. FY25 - 26 —Implement executed partnerships.
Generate quarterly virtual/hybrid “Town Hall” joint discussion sessions with Support Groups for mutual strategic planning/ coordination; record and publicly post.	Low	Assistant Director: Development Outreach Committee With support of: Executive Director Membership Coordinator	2025 - 2026	Pending	FY25 —Collaborate with Admin/Staff/and Outreach to Plan and set goals. FY26 —Implement as per discussions and evaluate success and failures (improve as needed).

Goal 6. continued - Cultivate key partnerships across Arizona and beyond.

Strategy 2. Enhance partnerships with AHS Support Groups.					
Action Step	Priority	Person/s	Year	Status	Methodology
Funnel actionable content and initiatives to AHS Outreach Committee for review and enactment.	Mid	Outreach Committee	2024 - 2026	Ongoing	<p>FY24—Review content of items for action, call for vote, and implement.</p> <p>FY25 - 26—Gauge actionable items for success and evaluate outcomes for success and evaluate outcomes on a regular basis.</p>

Strategy 3. Engage AHS Chapters and CHIs.					
Action Step	Priority	Person/s	Year	Status	Methodology
Support the development of Chapters into filled and energized organizations.	High	Executive Director Assistant Director: Development With support of: Senior Leaders (all)	2024 - 2025	Ongoing	<p>Current and identified operational needs (from previous Chapter conversations) include Board and member recruitment, and definition of a sense of purpose with concrete steps to-be-done in support of AHS. Chapters are intended to support AHS outreach and facilitate engagement with key regional stakeholders.</p> <p>FY24—Increase involvement with Chapters members and meetings. Aid in soliciting potential members. Needs facilitation from admins.</p> <p>FY25—Coordinate a joint meeting of all Chapter representatives to discuss future growth, support, and activities for mission-oriented support and development.</p> <p>FY25—Evaluate process and continue engaging and promoting.</p>

Goal 6. continued - Cultivate key partnerships across Arizona and beyond.

Strategy 3. Engage AHS Chapters and CHIs.					
Action Step	Priority	Person/s	Year	Status	Methodology
Market to and engage local communities within the five "regions" of Arizona.	Mid	MarComm staff Outreach Committee	2024 - 2026	Pending	FY24 —Outreach and Marketing collaborate for an action plan on engagement. FY25 - 26 —Enact plan and track all aspects for growth in marketing reactions.
Develop mutual goals and reporting schedules between Marketing staff and AHS Outreach Committee.	Low	MarComm staff Outreach Committee	2024 - 2026	Pending	FY24 - 26 —MarComm to present marketing strategy to Outreach Committee at onset of each fiscal year (July), with interim reports provided quarterly. FY24 - 26 —Establish minimum and recurring MarComm representation at monthly Outreach Committee meetings.

Strategy 4. Enhance awareness of AHS within the Arizona State government.					
Action Step	Priority	Person/s	Year	Status	Methodology
Develop a dedicated outreach strategy to engage key stakeholders within the Arizona Legislature, Governor's Office, and other statewide agencies and boards.	High	Senior Leaders (all) Outreach Committee	2024 - 2026	Ongoing	FY24 —Ensure up-to-date mailing lists for all Arizona elected officials and key inter-agency leadership, and include on all monthly and special external notices. FY24 - 26 —Call/email local and State legislators/elected officials with invitations to attend events or other functions. FY24 - 26 —Attend local Board Meetings/City Council Meetings for history month. FY25 —Seek proclamation of history month and other future planned events. Board members can assist with setup.

Goal 6. continued - Cultivate key partnerships across Arizona and beyond.

Strategy 4. Enhance awareness of AHS within the Arizona State government.					
Action Step	Priority	Person/s	Year	Status	Methodology
Enhance attendance by State reps at AHS outreach events and press releases.	Mid	Assistant Director: Development Communica- tions Manager	2024 - 2026	Ongoing	FY24 - 26 —Emails, calls to official staff to get AHS representatives on calendars of State/local elected officials. FY24 - 26 —Implement tracking documentation to quantify realization of events attended.
Cultivate Legislative and Executive support for AHS’ initiatives and operational needs.	Mid	Executive Director Assistant Director: Development Communica- tions Manager Outreach Committee	2024 - 2026	Ongoing	FY24 —Explore expansion of the Outreach Committee to support engagement with officials, or alternate means of State Board support. FY24 - 26 —Implement regular schedule & process to approach officials via scheduled meetings, invitations to AHS functions, etc. FY24 - 26 —Evaluate approaches and successes at EOY annually.

Strategy 5. Expand recurring conversations and considerations with educators statewide.					
Action Step	Priority	Person/s	Year	Status	Methodology
Develop a dedicated outreach strategy to engage key stakeholders within local, regional, and County schools and school districts.	Mid	VP of Education With support of: Assistant Director: Mission VP of Publications	2024 - 2026	Pending	FY24 - 26 —Join education groups, attend local and regional conferences with table outreach (e.g. AZ Rural Schools Association (ARSA), AZ Education Association (AEA), AZ School Administrators (ASA)). Local Museums and society can assist/partner (e.g. Robert Ballard’s museum has considered their own museum in a box. AHS staff must make contacts).

Goal 6. continued - Cultivate key partnerships across Arizona and beyond.

Strategy 5. Expand recurring conversations and considerations with educators statewide.

Action Step	Priority	Person/s	Year	Status	Methodology
Engage local and state colleges to provide internship and on-site learning opportunities for students.	Mid	VP of Education With support of: Assistant Director: Mission VP of Publications	2024 - 2026	Ongoing	Contact appropriate individuals and /or departments for direction and information on forward movement of goals.
Facilitate conversations with educators and researchers for future collaborations.	Mid	VP of Education With support of: Assistant Director: Mission VP of Publications	2024 - 2026	Pending	FY24 —Establish contact list of all regional education district directors and boards; host on-site receptions to promote educational programs. FY25 - 26 —Strengthen relations for joint programs, dedicated funding, and NHD support.

Strategy 6. Enhance partnerships with local, regional, and statewide social clubs, chambers of commerce, visitor bureaus, and other organized groups.

Action Step	Priority	Person/s	Year	Status	Methodology
Develop presence at hosted and through co-hosted events.	Mid	Assistant Director: Development History Engagement Coordinator Development Director	2024 - 2026	Pending	FY24 —Register as member with local Chambers and Visitor Bureaus in museum-based cities (Tucson, Tempe, Yuma, Flagstaff). FY24 - 25 —Establish recurring contacts with local service organizations (Kiwanis, Rotary, etc). FY24 - 26 —Work with Chapters and Support Groups to identify other regional networks and community organizations.

Goal 6. continued - Cultivate key partnerships across Arizona and beyond.

Strategy 6. Enhance partnerships with local, regional, and statewide social clubs, chambers of commerce, visitor bureaus, and other organized groups.

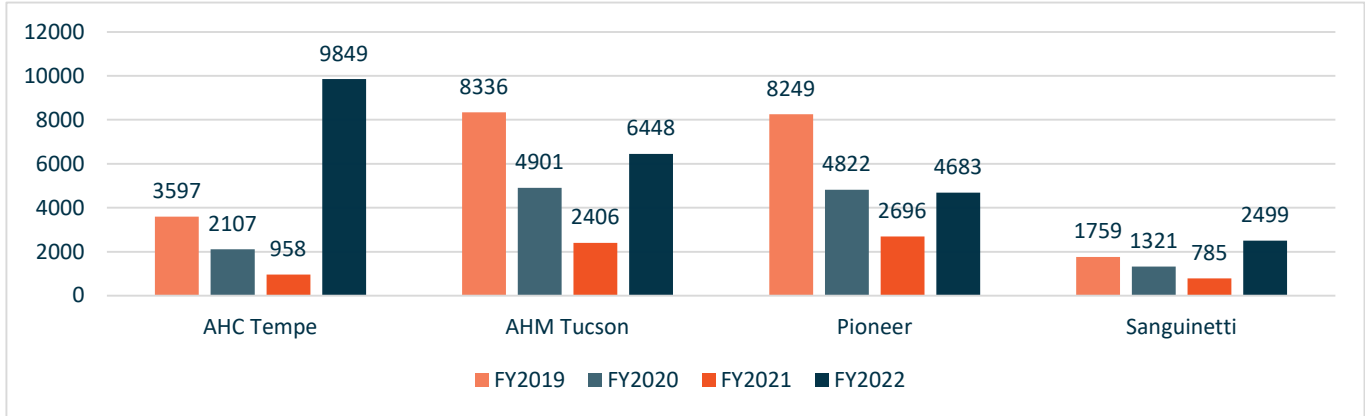
Action Step	Priority	Person/s	Year	Status	Methodology
Promote tourism and joint development opportunities.	Mid	Assistant Director: Development Sales & Marketing Manager	2024 - 2025	Pending	Research local events that AHS could collaborate with. Participate in attending and engaging with local tourism events.
Develop stakeholders and partners for joint grants and initiatives.	Mid	Development Director Assistant Director: Development	2024 - 2026	Ongoing	Outreach to further engage CHI's and museums to evaluate acceptance and participation in possible grants and programs.



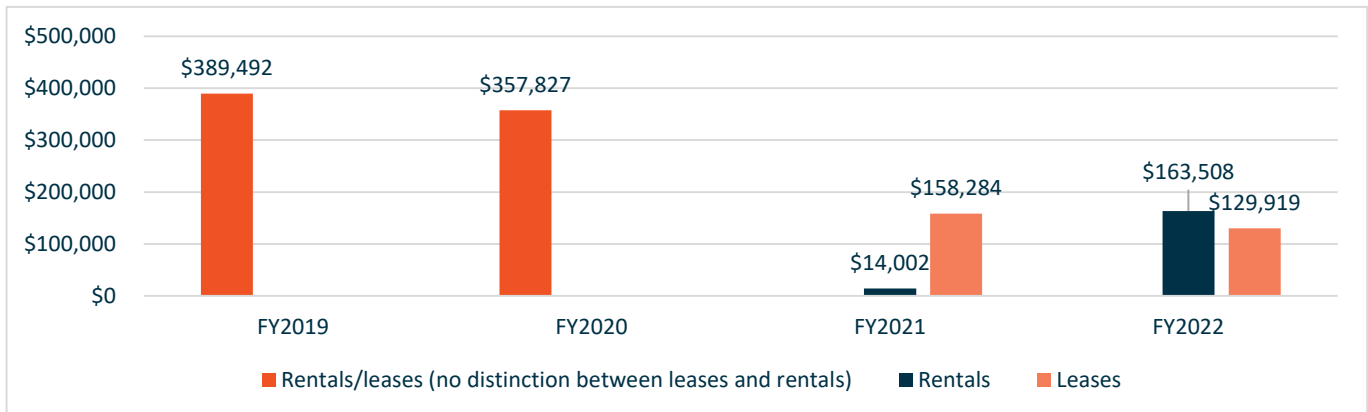
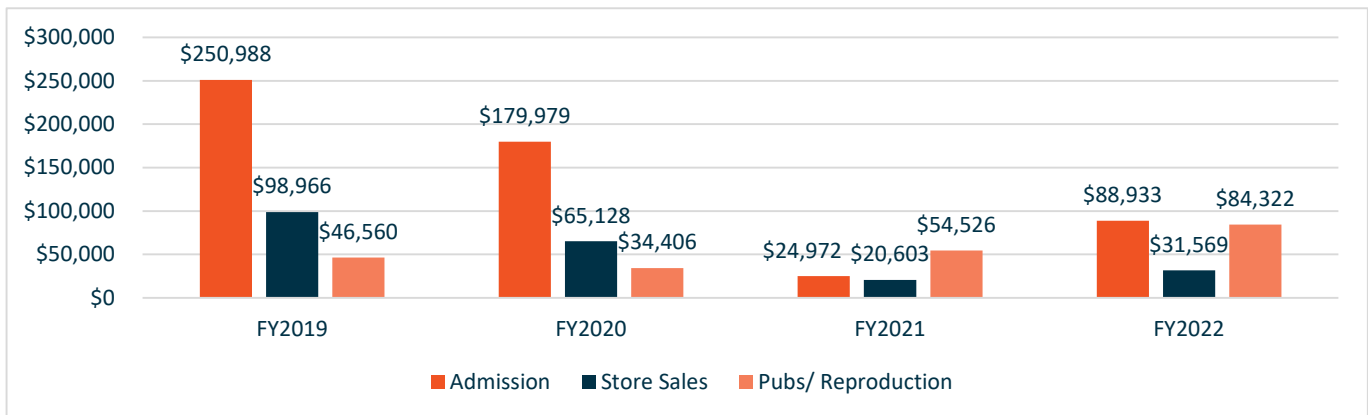
5. ACCOMPLISHMENTS TO-DATE

A. BY THE NUMBERS

Visitation¹⁸



Total Revenue (admission, gift shop, rentals, etc)

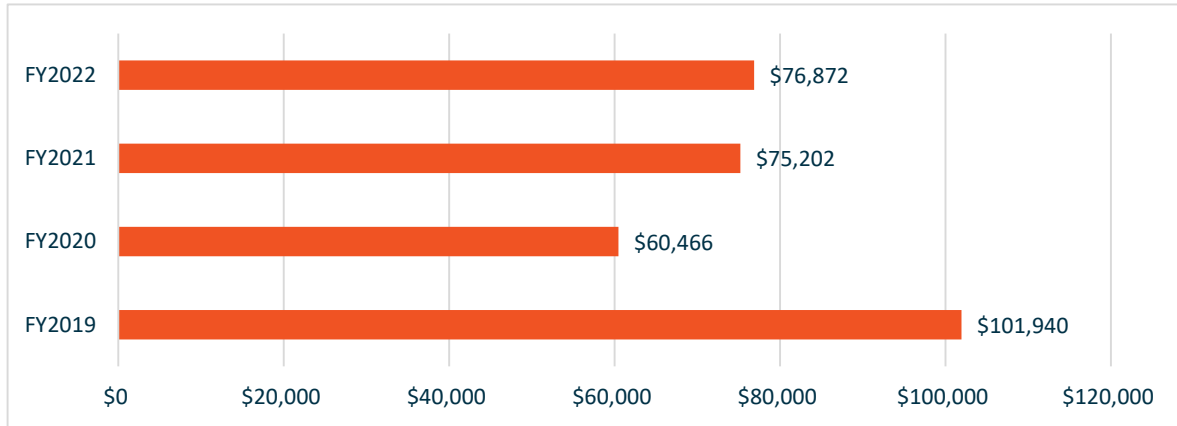


¹⁸Beginning FY21, visitation metrics began to incorporate non-paying attendees, such as those from public events, facility rentals, and meetings/conferences. This is intended to accurately reflect those impressions from anyone visiting an AHS facility and with the opportunity to experience its exhibits, collections, and archives.

A. BY THE NUMBERS

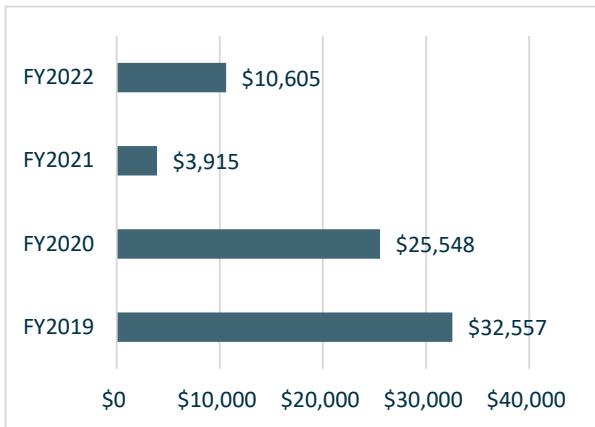
Earned Revenue

Program Revenue

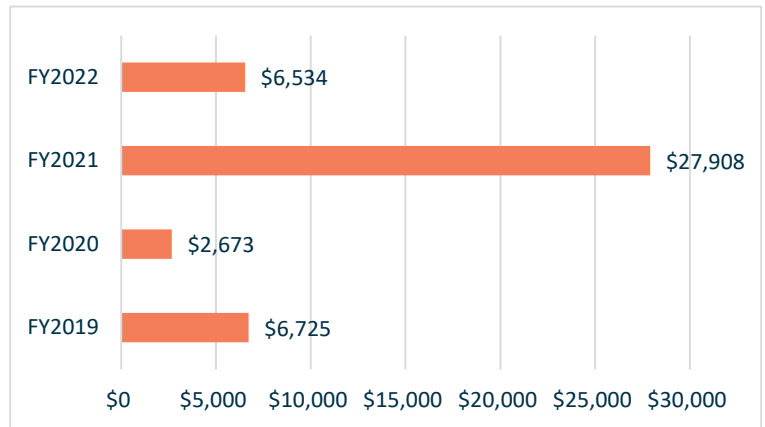


Other Revenue

Interest Income



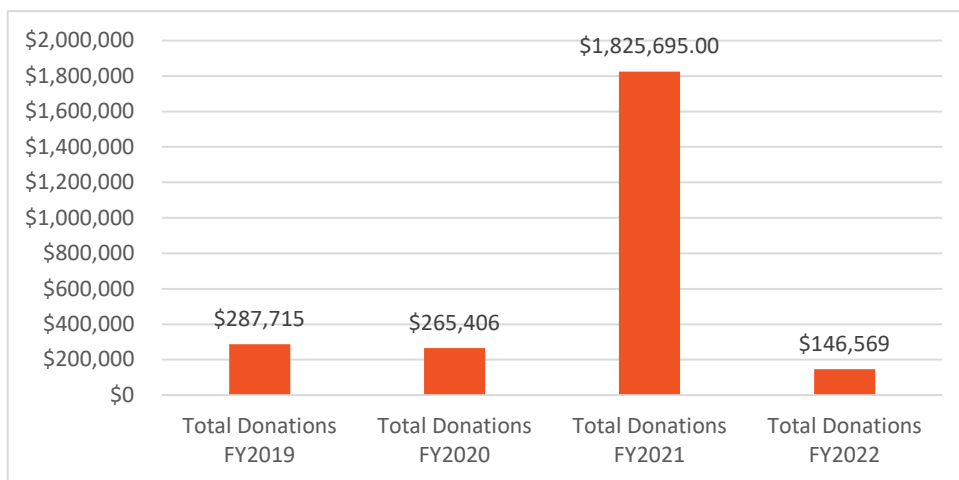
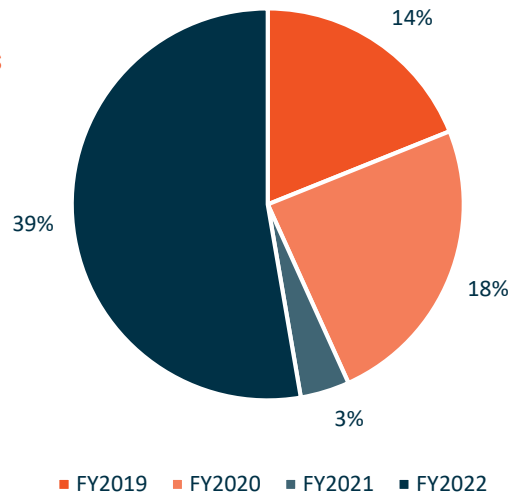
Misc. Income



A. BY THE NUMBERS

Total Annual Giving and Development

% of Donations with Memberships



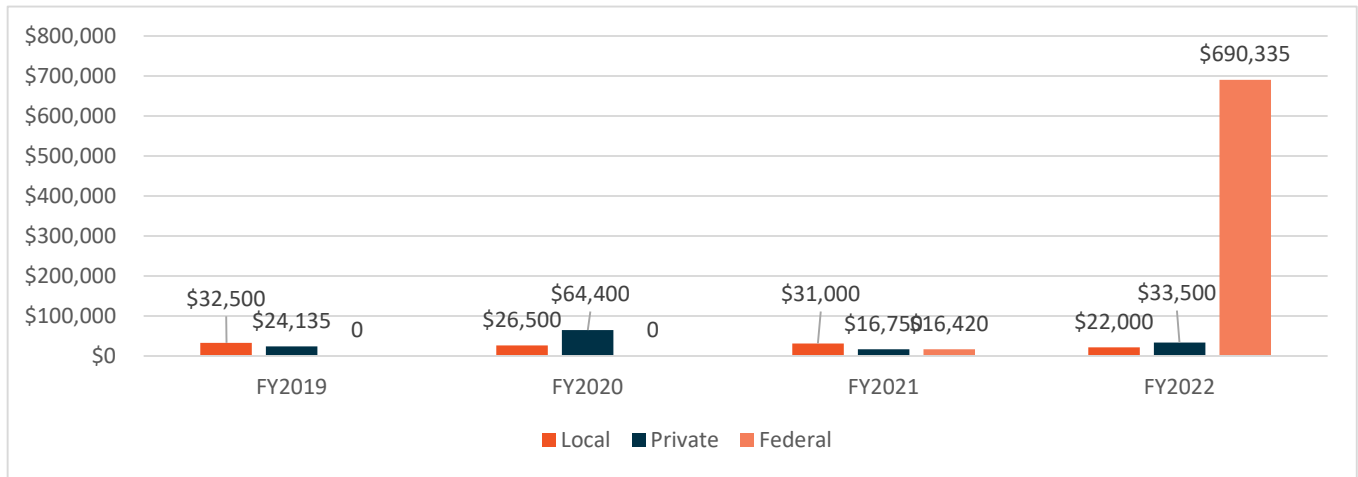
Total Membership

	FY2019	FY2020	FY2021	FY2022
# of Memberships	1,259	1,455	1,469	1,396
AFIS Membership Dues	\$61,785	\$73,435	\$69,500	\$68,085
Donation with Dues	\$39,712	\$47,030	\$52,260	\$57,031
Total	\$101,497	\$120,465	\$121,760	\$125,116

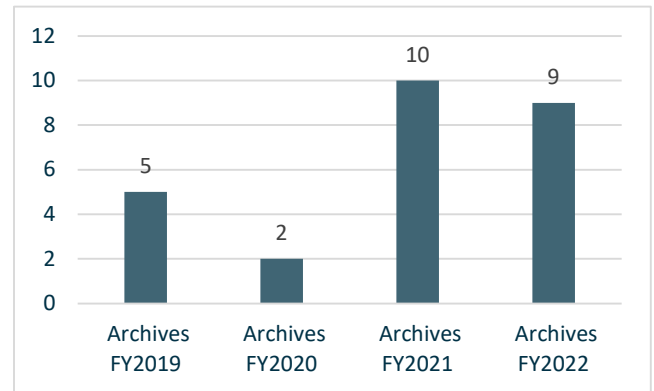
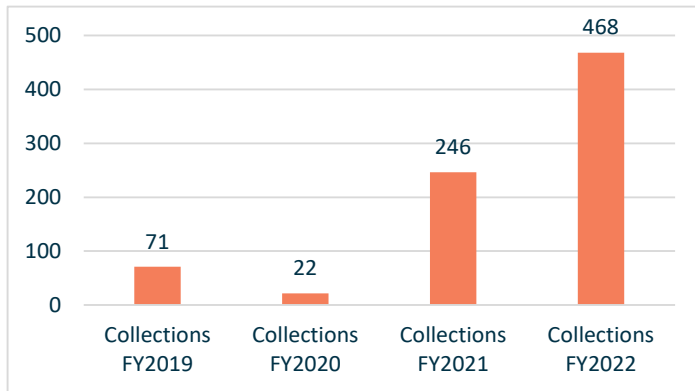
A. BY THE NUMBERS

Total Grant Funds Awarded

From AFIS:

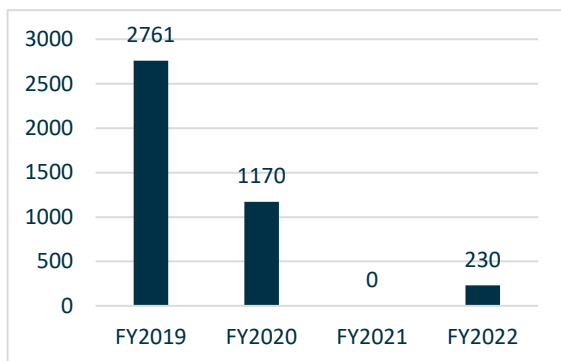


Total in New Collections and Archives Acquisitions



Education Program

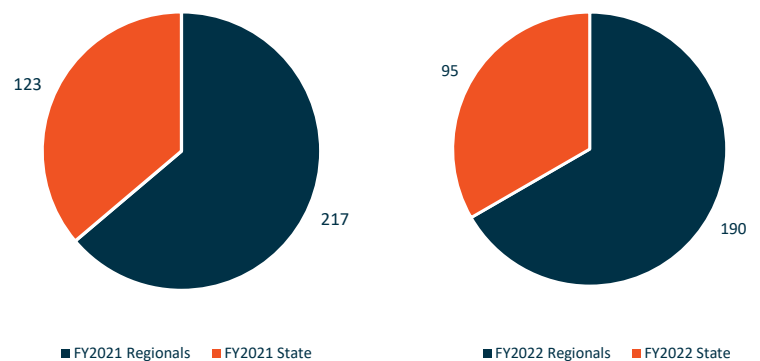
Tours - # of Participants



NHD program

of Participants

FY19 and FY20 information is not accessible.



B. PUBLIC EVENTS**FY21**

Title	Location	Date
History is Happening Now: Socially Distanced Oral Histories Workshop	Virtual	07-29-2020
AZ State Parks Travel Guide	Virtual	08-10-2020
Whistlin' Dixie in Arizona	Virtual	08-11-2020
Still Marching: Women in Resistance	Virtual	08-18-2020
Ask the Author: Suffrage Roundtable	Virtual	08-26-2020
Five Fs of Flagstaff	Virtual	09-02-2020
Going With The Flow, 13,500 years of Grand Canyon River Running History in 60 Minutes	Virtual	09-12-2020
Ecology of the Colorado River and Results of Bug Flow Monitoring	Virtual	09-14-2020
Arizona Monuments and Memorials	Virtual	09-17-2020
Still Marching: Women in the Classroom	Virtual	09-29-2020
Haunted Arizona	Virtual	10-20-2020
Fighting for the Franchise Native American Voting Rights	Virtual	10-29-2020
An Artist's Eye to History: A Conversation with Katherine McKenna	Virtual	11-12-2020
In the Shadows of the Freeway: Growing Up Brown & Queer - A Conversation with Dr. Lydia Otero	Virtual	11-19-2020
Histories of Justice: Rights and Representation	Virtual	12-17-2020
Caring for Historic Photos	Virtual	01-14-2021
"Current State" Talk with Breeze	Virtual	01-21-2021
I'll Take Credit for That	Virtual	01-28-2021
Arizona: Where Water is King and the Shadow is Queen	Virtual	02-03-2021
JOTPY Preserving Arizona's Covid Stories	Virtual	02-10-2021
Women Who Brew	Virtual	02-18-2021
Ask the Author Jason Gart	Virtual	02-25-2021

B. PUBLIC EVENTS**FY21 continued**

Title	Location	Date
Water and Art: Phoenix Mural Festival	Virtual	03-03-2021
From Sanatoriums to Sun City	Virtual	03-10-2021
Women in Aerospace: Stories from the Smithsonian Collection (Smithsonian hosts)	Virtual	03-17-2021
Never Alone: An Interview with Dr. Wong	Virtual	03-24-2021
Objects We Leave Behind	Virtual	03-31-2021
Stalking the Wild Foods Experts of Tucson	Virtual	04-10-2021
The Girl in the Iron Box	Virtual	04-15-2021
Ask the Author: Seeing Arizona, Imagining Mars - M. Amundson	Virtual	04-29-2021
Property Research Workshop (Tucson)	Virtual	05-06-2021
Somos Bilingues: Voices of Graduates of a Dual-Language Program	Virtual	05-08-2021
Eric Nystrom - Ham Radio	Virtual	05-19-2021
Copper Baptismal Fonts in Alta California	Virtual	05-27-2021
New Directions in Arizona History	Virtual	06-05-2021
Strategies for Teaching Black History	Virtual	06-19-2021
Pandemic Booms and Busts	Virtual	06-23-2021

B. PUBLIC EVENTS**FY22**

Title	Location	Date
Ancient Snapshots	Virtual	07-14-2021
AHS Education Round-Up	Virtual	07-18-2021
A Bird's Eye View: Finding C.J. Dyer	Virtual	08-05-2021
All Aboard! Railways of Arizona	Virtual	08-24-2021
Smithsonian Day	AHM and AHC	09-18-2021
Ready to Launch Family Day	AHM	09-25-2021
Dia de los Muertos Nichos Making	Virtual, AHM, and AHC	10-16-2021
American Chameleon: Wyatt Earp's Life of Reinvention Andrew C. Isenberg	Virtual	10-21-2021
Ready to Launch Closing Party	AHM	10-25-2021
Veterans of Washington-Escobedo Community	Virtual	11-10-2021
Pioneer Painter	Virtual	12-08-2021
Hallelujah Hats	Virtual	01-13-2022
Okemah Project	Virtual	02-24-2022
AZ Mining and Minerals	Virtual	03-31-2022
Ask the Author-- Osburn	Virtual	04-07-2022
Ask the Author-- Pagan	Virtual	05-19-2022
Ask the Author-- Andelic	Virtual	06-16-2022
Juneteenth Celebration	AHC	6-19-2022

B. PUBLIC EVENTS**FY23**

Title	Location	Date
Ask the Author– Cherland	Virtual	07-11-2022
“Born to Fly” children’s program	SHM	08-17-2022 and 08-20-2022
Ask the Author– Lake	Virtual	08-25-2022
Ask the Author– Sport History Roundtable	Virtual	09-15-2022
Smithsonian Day	AHC	09-17-2022
Dr. Amahia Mallea Lecture	AHC	09-26-2022
AZ Outlaws	SHM	09-28-2022 and 10-01-2022
Ask the Author– McCormack	Virtual	10-08-2022
Night at the Museum	AHM	10-22-2022
Dia de los Muertos Kids Program	SHM	10-26-2022 and 10-29-2022
Ghost Tour	SHM	10-28-2022
William deBuys Lecture	AHC	11-16-2022
Ask the Author– Stoutamire	Virtual	11-30-2022
Ghosts of Christmas Past	AHM	12-17-2022
Arizona Outlaws: Laws and Lawbreakers of Arizona	SHM	01-14-2023
Capt. Jack Mellon Garden Talk	SHM	01-25-2023
Rebuilding Home Plate Reveal and Reception	AHC	01-25-2023
I AM Exhibit Opening and Event	AHC	02-03-2023
Arizona Statehood Day Celebrations	AHM and AHC	02-04-2023
Women’s Air Derby Garden Talk	SHM	03-14-2023
Tom Zoellner Talk	AHC	03-16-2023
NHDAZ State	Offsite–ASU	04-15-2023
Drinking Local Exhibit Reveal and Reception	AHM	04-19-2023
Food and Power in Japanese American Concentration Camps	AHC	05-03-2023

B. PUBLIC EVENTS**FY23 continued**

Title	Location	Date
Lynn Downey Book Talk	Virtual	05-18-2023
Juneteenth Celebration	AHC	06-18-2023
Grand Canyon Botany Book Talk	Virtual	06-22-2023
AHM/MAHHM Summer Series 1	AHM	06-22-2023
JAH Publications Workshop	Virtual	06-24-2023

C. EXHIBITIONS**FY19**

Exhibit Name	Facility Location	Date Opened	Date Closed
John Slaughter's Changing West: Tombstone, Bullets and Longhorns	AHM	09-08-2018	05-2020
History Labs	AHM	05-2019	08-2020
Resilience: Women in Flagstaff's Past and Present	Pioneer	08-23-2019	2022
Dia de los Muertos	AHM	10-30-2019	11-30-2019
A Place for all People	AHC		12-31-2019
I Have a Name	AHC		10-05-2019
Current State	AHC	11-13-2019	03-31-2021
Beasts of Burden	AHC	08-07-2019	08-13-2021
Stories of Resilience: Overcoming Adversity in Arizona	AHM	End of 2019	Current
Clues: History Mystery	Yuma	2019	Summer 2021

C. EXHIBITIONS

FY20

Exhibit Name	Facility Location	Date Opened	Date Closed
Spanish Colonialism	AHM	01-2020	Current
Arizona 101	AHM	02-2020	Current
Still Marching	AHC	03-05-2020	12-30-2021
Treasures Refresh	AHM	04-2020	06-2023
Keeping Cool	AHM	07-2020	10-2020
K7UGA: Barry Goldwater	AHM	08-2020	03-13-2023
Staff Picks	AHM	10-2020	03-2021

FY21

Exhibit Name	Facility Location	Date Opened	Date Closed
Ready to Launch	AHM	05-20-2021	12-01-2021
Unframed	AHC	04-2021	12-2022
Becoming Flagstaff: Stories from the High Country	Pioneer	08-17-2021	Current
Growing Yuma: The E.F. Sanguinetti Story	Yuma	10-15-2021	Current

FY22

Exhibit Name	Facility Location	Date Opened	Date Closed
Los Desconocidos: The Migrant Quilt Project	AHM	01-20-2022	02-28-2023
On Air	AHC	02-24-2022	Current
Covid Memorial Quilt	AHC	03-06-2022	03-11-2023

C. EXHIBITIONS

FY23

Exhibit Name	Facility Location	Date Opened	Date Closed
Climates of Inequality	AHC	07-12-2022	01-11-2023
Dia de los Muertos	AHM	10-10-2022	11-23-2022
Rebuilding Home Plate	AHC	01-25-2023	05-27-2023
I Am	AHC	02-03-2023	07-29-2023
Drinking Local	AHM	04-19-2023	Current
Welcome Quilts	AHM	05-18-2023	Current
Hallelujah Hats	AHC	06-17-2023	Current

FY24

Exhibit Name	Facility Location	Date Opened	Date Closed
Mr. Arizona	AHC	09-26-2023	TBD
Treasures Refresh	AHM	08-2023	TBD
Arizona Border Exhibit	AHM	05-25-2024	TBD

6. RESOURCES NEEDED

The following list of resources represents those needed to address identified deficiencies within the organization and ensure the successful implementation of this Interim Report. The assessment of current resources was implemented with consideration of post-event and post-exhibit evaluation reports, monthly and annual tracking reports, direct feedback from AHS staff, and the 2022 SWOT survey. These outstanding needs should be explored for development or acquisition in support of the goals and strategies of this Interim Report. Within their own department or area of activity, these needs have been listed in order of priority.

OVERALL

1. Budget Resolution

- The current operational scope of AHS – permanent and rotating exhibits, collections and archives storage, research inquiries, field trips, supporting educational lessons and content, National History Day, the *Journal of Arizona History*, an active social media presence, monthly subscriber and members-only newsletters, public events, private facility rentals, guest experience and gift shop, and the care and operation of 4 museums and an additional 3 historic sites (totaling 13 buildings across 7 properties) – exceeds its funding capacity.
- AHS must develop additional funding sources to maintain its current operational foci or develop plans for FY27 to reduce the scope of its operations to strictly align with the stated priorities of [Arizona State statutes 41-821 through 41-826](#). At present, an estimated \$1.62m¹⁹ in additional annual funding is required to meet current operational realities.
- These funds would support AHS operations primarily through added financial support for existing staff and the creation of 5 new positions (54 total), establishment of a functional budget for facilities repair and maintenance, and coverage of annual cost increases to state support services and utilities.

2. Policies and Procedures

- As an agency, AHS has over 100 years of not only institutional documentation and history but also clutter. An effort has been underway since 2021 to update these records and to better align AHS with modern Arizona State systems.
- Without clear and accessible core documentation and instruction on policies and interdepartmental processes or oversight, it is difficult-to-impossible to enforce standards of practice across the agency's four museum locations. This issue represents a persistent trickle that is slowly being addressed through new documentation, but the agency currently lacks the resources to prioritize its rapid development and implementation.
- This is a long and tedious process, which requires not only drafting efforts by AHS staff but also review and approval by other non-agency personnel. Additional resources – either those in direct support or toward off-setting other tasks/duties shared by AHS staff assigned to this project – may be required to improve these efforts.

3. Legislative Outreach

- As revealed by the recent passage of HB-2145 in FY23 (Dude Ranch historical markers), there is a general ignorance of AHS, its expertise for consultation, and its operational capacity amongst the Legislature. Despite the impact of such bills on AHS' operations, the agency was only consulted at the 11th hour and without an ultimate impact on the final determination. Unless addressed, this will continue to negatively affect the organization, either through Legislature-approved reallocations of its existing operational funds (appropriated or otherwise) or their determination on the reduction/growth/maintenance of its current operating budget.

¹⁹The updated FY24 budget passed in May 2023 specified \$1.45m. However, a FY24 recalculation of the organization's liability saw an increase in fees of \$170,000. This increases the overall agency need to \$1.62m.

OVERALL CONT.

4. Board Support

- The AHS Board does much behind the scenes to directly support the efforts of the Executive Director and staff. This includes utilizing the state-wide networks of Board members and drawing from their professional expertise and experience. No financial obligations are presently requested from Board members.
- From the 2022 SWOT Survey and direct feedback from AHS staff, there is an underlying tension perceived between the Board and staff. Much of this surrounds the management and organization of monthly Board and Committee meetings: with few exceptions, AHS staff presently manage the majority of support operations for these meetings, specifically agenda and minutes drafting/publication. The duties of Board officers within Board meetings (and excluding committees) establish the separation of these duties from staff and instead place responsibility on the officer positions (e.g. Board secretary).
- Updating this arrangement to more closely align with the organization's Bylaws and Policies will reduce staff responsibilities for non-assigned roles and alleviate current stressors and limiters on staff time – as well as foster a greater collaboration between Board/committee leadership and AHS staff in the former's oversight, support, and engagement.

5. Volunteers & Interns

- Due to limitations in the AHS operating budget, as well as continuing hiring difficulties at select museum locations (e.g. Flagstaff), alternate solutions to staffing are required.
- A robust, sustainable, and regular/recurring volunteer program and schedule may serve in place of staffing when supported by AHS personnel of an appropriate grade.
- Recruitment efforts must be increased and targeted by region, with consideration given to the networks and membership of local AHS Chapters and Support Groups.

6. Travel

- In FY23, in-state travel funds were primarily allocated to cover out-of-region travel by AHS staff from other facilities to support weekend operations at Pioneer Museum in Flagstaff. In total, FY23 travel expenditures represented 223% of the original budget allocation.
- With the anticipated re-opening of Pioneer Museum in FY24, these sort of travel expenditures are expected to decrease.
- Cost savings are required to bring the FY24 and future in-state travel budgets to their allocated amounts. However, clear and future prioritization of these funds is required to ensure compliance within budget.
- In-state conferences & events (e.g. NHD, History Convention) (estimated \$4,000 annually)
- History Engagement Coordinator (HEC) community talks (estimated \$6,000 annually)
- Curation and archives-driven travel
- Senior Leadership community meetings
- Inter-facility staff retreats and exchanges

7. State Vehicles

- The current AHS fleet, while still relatively new and operational, consists of two vans distributed between AHC Tempe and AHM Tucson.
- Due to increased cross-site travel by AHS staff, a third vehicle – preferably a sedan – should be explored for purchase to minimize vehicle rentals and reduce budgeted in-state travel costs.

COLLECTIONS, LIBRARY, AND ARCHIVES

1. Increased Storage Capacity

- Rolling Shelf Storage – the acquisition and installation of rolling, combat storage units will greatly reduce the current linear footprint of the AHS archives and collections areas at both AHC Tempe and AHM Tucson. FY22 estimates for this work were \$1,851,937.26.
- New Construction – wherever possible, AHS must explore opportunities for the physical expansion of its collections and archives storage spaces. Deaccessioning efforts and updates to the shelving units continue to offset and provide for new collections acquisitions. However, both have a hard limit and stop point. At minimum, an additional 15,000 sq. ft. of dedicated storage space is required to meet storage needs for the next 30 years.²⁰

2. Digital Archives Resolution

- The current AHS digital resources management plan sees the digitization of archives inventories (e.g. finding aides) as PDFs, which are then directly posted as dedicated links/pages within the AHS website. ArchivesSpace is an identified piece of specialized software that will update this access into a searchable public database. This software has an up-front cost of \$20,000 and a recurring annual subscription of \$4,000.
- ContentDM is an existing subscription used by AHS to provide online access to its published [digital collections](#), and which serves as a digital exhibition space. This specialized piece of software has a recurring annual subscription of \$6,000, but is subject to change based on the number of entries created.
- A third piece of software is required to effectively integrate these two other digital resources, and to provide the overall systems architecture for their combined management of all digital archives assets. This Digital Archives Management System (DAMS) has an initial, up-front cost of \$100,000 and a recurring annual subscription of \$20,000.

3. Digitization Equipment

- Oversized scanner for AHM Tucson to facilitate maps and posters. Estimated purchase cost is \$10,000-13,000.

EXHIBITS

1. Dedicated Fund or Development Strategy for Permanent Exhibits Refresh

- The permanent exhibits of both the AHC and AHM museums are now over 30 years old since their installation or last major update. The museum industry has seen major updates in technology and changes to the pedagogy of visitor learning and engagement.
- Based on current design-build estimates for the Molina Block and original construction costs of the present exhibits, a minimum of \$30m is required for a total update of AHS' 39,233 sq. ft. of permanent exhibition space.²¹
- A long-term funding solution, beyond consideration of annual funds, is required to ensure the successful completion of this project.

2. Exhibit Preparator Space, AHM Tucson

- AHM has no developed preparator station (e.g. metal shop, wood shop) for exhibits development or facility repair, resulting in the travel of AHM staff to AHC Tempe to utilize its facility resources. A dedicated space within Tucson is desired and should be secured, either as a build-up within AHM or through shared services with other state agencies.

²⁰This estimate is based on the rate of fill of both AHM Tucson and AHC Tempe after their respective additions and construction in 1973, 1987, and 1993.

²¹Estimated 17,269 sq. ft. for AHC Tempe. Estimated 21,963 sq. ft. for AHM Tucson.

EXHIBITS CONT.

3. Update/repair Deficient Systems

- Across the current AHS permanent exhibits (primarily at AHC and AHM), there is at least \$60,000 in estimated repairs to replace broken or outdated technology and equipment. This includes replacing tube television sets with more compact and efficient LCDs, replacing broken speakers and audio components, and paying for electrical work to repair broken interactives. A more thorough analysis is first required to confirm the budget needed.

DEVELOPMENT

1. Develop Sustainable, Annual Sponsors/donors for Dedicated AHS Events/services

- Prioritize annual meeting and multi-event coverage (e.g. all exhibit receptions, all public events, NHD).

PUBLICATIONS

1. Grow the Research Fellowship Program

- For the past two years, around \$10,000 has been awarded annually to visiting research fellows. This has been an immense boon to AHS' efforts to increase the number of researchers working on Arizona topics, but more support is needed to facilitate their travel to Arizona for that work. Additional funding of \$20,000 per year would help reach agency goals.

2. Expand Online Accessibility to AHS Lectures and Events

- High-quality live streaming equipment is required to support off-site outreach and participation in AHS special events and services. \$5,000 is estimated to facilitate the purchase of this equipment.

3. Develop resources for *JAH's* continued growth

- An additional \$10,000 in annual allocations will provide for new content and features to the *Journal*, including color images for photo essays.

EDUCATION

1. Prioritize volunteer recruitment and development on Education (e.g. tours, NHD, etc)

2. Establish sustainable funding streams for student contests, student travel, and professional development events (estimated \$20,000 annually).

GUEST EXPERIENCE

1. Review and Update to Agile POS System

- The current Point-of-Sale system should be reviewed for its accessibility for both in-person and online sales, as well as its compatibility with AHS financial and communications systems (e.g. AFIS, DonorPerfect, EventPro360), and a recommendation issued to retain, retool, or reject the current platform.

MARKETING & COMMUNICATIONS

1. Upgrade DonorPerfect and Constant Contact Accounts & Billing

- AHS retains two pieces of software on annual subscription to support its membership and general subscriber communications. Both programs feature variable billing that scales based on the number of entries created within the software – the more users added, the more expensive the cost. As AHS scales with new members and increases the quality and type of its engagement, these programs will continue to increase their fees.
- AHS needs an additional \$290 annually to upgrade DonorPerfect to include custom forms and templates to support outreach efforts (e.g. legislative tracking).
- In FY23, AHS upgraded its ConstantContact account to accommodate 22,021 additional contacts, for an additional \$1,450.40 annually.

2. Update AHS website to increase accessibility and reduce data clutter

- AHS is currently soliciting bids for this work, with the possibility of employing State shared services. Estimated costs average around \$86,000.

FACILITIES

1. Increase Facilities Care at Non-central Museums and Sites

- AHS is unable to provide on-site facilities support at each of its 4 museums. Facilities staff are based at AHM Tucson and AHC Tempe. Support of the Pioneer and Yuma museums is currently done at the request of attending site personnel or by scheduled site visits.
- AHS already employs temporary contract workers to oversee grounds care and gardening at Pioneer and Yuma museums.
- AHS is working to expand temporary worker coverage to include limited facilities maintenance, cleaning, and events management (setup-takedown). Yuma is facing issues with sourcing local vendors and their reliability.

2. Increase Project Cost Offsets Through Inter-Agency Resources and Assistance

- Expand work with ADOA to secure additional support to offset total project costs for planned or emergency facility repairs (e.g. CIP).

FINANCE

1. New “Accountant” Position to Assist VP of Finance

- The Accountant position was incorporated into the VP of Finance position in May 2022. Upon review of the scheduled goals/assignments of the Finance Department within this Interim Report, the added support provided by a separate accountant is required to meet project deadlines.
- Creation of a new “Accountant” position or contracting of vendor services is required; funding is not currently available.

2. Review and Update Investment Fund Allocations

- Updates approved at the 9-26-22 Executive Committee meeting.
- AHS is working with CSB to complete required forms to formalize the Fund update.

3. Review and Update Enterprise Fund allocations

- New function codes need to be created under “Expenditures” to provide dedicated budgets to specific departments (e.g. exhibits, collections and archives).
- The assignment of specific revenue streams must be reviewed to ensure full accuracy in reporting (e.g. grants vs donations), and to better align revenue generated by specific departments with their dedicated budget for expenditures.

Connecting people through the power of Arizona's history.



FLAGSTAFF



TEMPE



YUMA



TUCSON



 ARIZONA
HISTORICAL
SOCIETY