

**ARIZONA
HISTORICAL
SOCIETY**

STRATEGIC PLAN

2016-2019

EXECUTIVE SUMMARY

Established by an Act of the First Territorial Legislature on November 7, 1864, the Arizona Historical Society (AHS) is Arizona's oldest historical agency. Architects of the Territory's code of laws realized they were making history and that it was important to preserve a record of their activities. One of their earliest actions was to create the means for documenting the past and recording contemporary events as they unfolded. This became the Arizona Historical Society that we know today, formed to collect and preserve "all facts relating to the history of this Territory." After statehood, in 1913, new legislation re-affirmed the Arizona Historical Society and re-established it as a trustee agency of the state to preserve our most precious of commodities, our history. Current statutes, A.R.S. §41-821 and A.R.S. §41-823, continue the legislative direction first established in 1864.

Mission

The mission of the Arizona Historical Society is to collect, preserve, interpret, and disseminate the history of Arizona and the West.

Vision

The Arizona Historical Society engages people in the exploration of Arizona's diverse cultural and natural history. Through comprehensive and innovative services, interpretive programs, and stewardship, we provide connections to the past, perspective on the present, and inspiration for the future.

The Arizona Historical Society was established as a trustee agency for the state and a non-profit educational corporation. The Society actively and diligently pursues its objectives to be a community resource and partner, a 21st century information agency, and stewards of Arizona's past, present, and future.

To accomplish these objectives, the Arizona Historical Society:

- Collects, preserves, and provides access to AHS collections and resources.
- Supports local historical museums through AHS Certified Museum Program.
- Publishes the *Journal of Arizona History*, books and monographs.
- Expands access to AHS collections and resources through outreach programs, on-site, off-site, and on-line services.
- Conducts seminars, institutes, and workshops for students, educators, professionals, local history museums throughout the state, as well as the general public using library, archive, and museum resources.

- Provides tools and assists classroom teachers in curriculum development.
- Collaborates with federal, state and local governments, industry, school districts, and community organizations to strengthen Arizona's cultural infrastructure.
- Organizes and sponsors the annual Arizona History Convention.
- Selects annual *Al Merito* award to individuals and organizations for achievements in contributing and promoting Arizona history.
- Serves on the Arizona Historic Advisory Commission, the Governor's Awards in Historic Preservation Selection Committee, Arizona Historic Records and Archives Board.
- Administers and approves the Arizona Historic Marker Program.
- Directs the AHS Fellowship Program.
- Appoints AHS representative to the Historic Sites Review Committee, the Arizona State Board of geographic Historic Names Committee, the Arizona Parkways, Historical and Scenic Roads Advisory Committee.



The resources held in trust by the Arizona Historical Society are the most comprehensive in scope---reflecting the history, development, and cultures of the state---available anywhere. Consequently, other entities frequently call upon AHS as a primary resource for information, education, and loaned material. While we collaborate

with many entities to promote Arizona, AHS serves as the principal agency encompassing all aspects of our state.

HIGH PRIORITY GOALS

STRATEGIC PRIORITY I: ADMINISTRATIVE PLANNING

The Arizona Historical Society strives to develop and strengthen its human resources and organizational management knowing that the most important part of keeping the Society operational is the people and their collective energy, knowledge, and enthusiasm.

Strategic Goal 1.1: Create a healthy climate and culture, efficient operations, and performance targets to increase the effectiveness of our mandate delivery.

Objective 1.1.1: Establish and use effective communication among staff and administration.

Objective 1.1.2: Involve staff in identifying and implementing strategies to create and maintain a climate and culture that will make working at AHS satisfying, meaningful, and effective in providing public value.

Objective 1.1.3: Develop a culture and incentive system that promotes effective internal and external customer service and teamwork.

Strategic Goal 1.2: Provide for continuous improvement and efficient allocation of resources.

Objective 1.2.1: Assess human resource skill/ allocation needs based upon external environmental factors and develop human resource recruitment and succession plan to optimize agency long-term performance.

Objective 1.2.2: Assess and recruit for specific skills sets for staff, and boards.

Objective 1.2.3: Organize the Divisions as needed to take advantage of skills and opportunities and effectively provide mandated functions.

Objective 1.2.4: Identify needed training and development and ensure staff is adequately trained for present and future needs.

Objective 1.2.5: Ensure that policies and procedures meet current and future needs.

Objective 1.2.6: Recruit and develop a diverse workforce so that we can better serve a diverse public.

Strategic Goal 1.3: Help staff reach full potential and meet stakeholder expectations.

Objective 1.3.1: Create and implement new hire orientations.

Objective 1.3.2: Implement professional development for AHS Board, agency leadership and department staff.

Objective 1.3.3: Provide strategic training opportunities for individuals based on annual plan, agency need, individual goals and work group resources.

Objective 1.3.4: Ensure that staff have the skills, competencies, training, and tools they need to support their customers in a changing environment.

STRATEGIC PRIORITY 2: FINANCIAL PLANNING

The Arizona Historical Society strives to define and develop financially responsible fiscal management.

Strategic Goal 2.1: Identify and Secure Additional Funding Sources.

Objective 2.1.1: Develop and strengthen every avenue of public support to secure future public funding.

Objective 2.1.2: Plan and mount major capital and endowment campaigns.

Objective 2.1.3: Increase earned income from fees and services in accordance with revenue enhancement tactics.

Objective 2.1.4: Develop private sector partnerships to leverage rental potential of agency sites and commercial use of collections.

STRATEGIC PRIORITY 3: CAPITAL PLANNING

The Arizona Historical Society strives to maintain and improve the care of the interior and exterior of its museums. The integrity of museum buildings directly impacts the visitor experience and public safety, as well as the collections housed within their walls.

Strategic Goal 3.1: Create a plan for realizing the usage potential of AHS real estate holdings that anticipates needs and opportunities in using space to achieve organizational goals.

Objective 3.1.1: Evaluate properties and plan for optimal financial productivity and strategic applications.

Strategic Goal 3.2: Address deferred maintenance needs and create a schedule of necessary maintenance.

Objective 3.2.1: Develop plan to prioritize and subsequently mitigate deferred maintenance issues in museum buildings.

Objective 3.2.2: Engage in open dialog with State pertaining to fund allocations and maintenance of state owned facilities.

Strategic Goal 3.3: Develop, fund, and implement a capital improvement plan that takes into account AHS's needs up to the next 25 years.

STRATEGIC PRIORITY 4: I.T. INFRASTRUCTURE

The Arizona Historical Society is a 21st century information agency. AHS will be instrumental in shaping Arizona's identity for the next 100 years. How the world will understand Arizona, will largely be determined by the historical documents and objects we keep. That, in turn, will be determined by technology and technology informs all aspects of what we do. We now seek, identify, capture, store, transmit, and deliver information in all formats. We will support an information technology infrastructure that is flexible, robust, secure, and scaleable, and that serves AHS's customers, both internal and external. Having the ability to manage, use, find, share, and appropriately dispose of electronic records is vital for the effective functioning of AHS and it is central to an agency that strives to be transparent, participatory, and collaborative.

Strategic Goal 4.1: Maintain a high-quality technological infrastructure that is capable of supporting all of our internal operations and the website.

See Appendix A for IT Strategic Plan

STRATEGIC PRIORITY 5: ONLINE PRESENCE

Strategic Goal 5.1: Develop and implement a plan for strategic web development that makes arizonahistoricalsociety.org the primary online resource for people to connect with Arizona’s history.

Objective 5.1.1: Develop a team-based approach to improving our technological infrastructure to include our web properties.

Objective 5.1.2: Develop an educator’s portal on AHS’s website that utilizes new media to create accurate, engaging, and standards-based materials to disseminate AHS’s resources.

Objective 5.1.3: Develop and implement a social network plan that makes it easy for individuals and organizations to more easily access AHS resources.

Strategic Goal 5.2: Facilitate online purchase of retail items and payment for AHS services and programs.

STRATEGIC PRIORITY 6: COLLECTIONS STEWARDSHIP

The asset that distinguishes AHS from its peers is its rich and irreplaceable collection of historical artifacts, natural history specimens, manuscripts, and printed material.

Strategic Goal 6.1: Develop strategies for storage, preservation, and collections security.

Objective 6.1.1: Prioritize and address the preservation needs of all AHS collections, regardless of format.

Objective 6.1.2: Proactively adapt our security measures for our staff, collections and infrastructure to meet changing threats and vulnerabilities.

Objective 6.1.3: Develop and implement a comprehensive Collections Management Manual including Collections Development plans for each collecting Division and development of a comprehensive collections management plan.

Objective 6.1.4: Adopt and implement a collections disaster plan.

Objective 6.1.5: Establish effective physical control over all collections: launch inventory process and develop target for data entry.

Objective 6.1.6: Create a plan for cataloging and processing backlog and incorporate the plan into division level manuals.

Strategic Goal 6.2: Manage the Collections using appropriate technological tools for more complete understanding, greater public access, and enhanced public programming

Objective 6.2.1: Develop integrated plan for gathering collections info, identify data to share with public, create front-end searchable database.

Objective 6.2.2: Develop plan for exponential database growth and access.

Strategic Goal 6.3: Assist customers in surveying, preserving, developing, interpreting, and utilizing heritage resources to facilitate economic development, community improvement, heritage tourism, and quality of life.

Objective 6.3.1: Provide individuals and groups with ease of access through a variety of channels – including online catalogs and finding aids, on-site databases, school tours, educational programs, exhibitions, and off-site programs, exhibitions, and partnerships.

Strategic Goal 6.4: Maximize AHS's existing collections storage capacity to meet its current needs and expected growth.

Objective 6.4.1: Evaluate all of AHS's existing properties for space use and environmental appropriateness for collections storage purposes.

Objective 6.4.2: Identify criteria of appropriate collections storage spaces.

Objective 6.4.3: Develop plans for reclaiming or re-purposing spaces for additional collections storage.

Objective 6.4.4: Deaccession materials inappropriate to the mission and remove those items from AHS collections storage spaces.

Objective 6.4.5: Strategic Goal: Improve curatorial workspace for accessioning and preservation.

STRATEGIC PRIORITY 7: COLLECTIONS ACCESS

In the decades to come, the expectation of easy online access to AHS holdings will grow. The breadth of information available on the Internet has increased public demand for faster access to more information.

Strategic Goal 7.1: Provide convenient access to collections for customers and public.

Objective 7.1.1: Develop a comprehensive integrated and automated collections records system.

Strategic Goal 7.2: Equip these facilities and staff with the tools to help researchers locate records at any AHS facility.

Strategic Goal 7.3: Provide statewide leadership through leveraging partnerships to preserve and provide access to the evidence of Arizona's past.

Strategic Goal 7.4: Address the challenges of electronic records to ensure success in fulfilling AHS's mission in the digital era.

Objective 7.4.1: Identify permanently valuable electronic records wherever they are, capture them, and make them available in usable form as quickly as practical.

Objective 7.4.2: Partner with agencies, research institutions, and private industry to develop, implement, manage, and promote our electronic records program both within AHS and for the public at large.

STRATEGIC PRIORITY 8: EDUCATION AND PUBLIC PROGRAMMING

Strategic Goal 8.1: Improve the quality of interpretive services statewide.

Objective 8.1.1: Assess all interpreters (Amazing Arizonans, guides, docents, suitcase presenters, speakers bureau, etc.).

Objective 8.1.2: Evaluate, reorganize, eliminate, and/or rename current programs.

Objective 8.1.3: Design and implement school tours with thematic approach.

Objective 8.1.4: Recruit and train guides for AHS museums and programs.

Objective 8.1.5: Implement Arizona History Forum guide training program.

Objective 8.1.6: Continue development of interpretive products to be used in all AHS museums.

Objective 8.1.7: Work with regional Division Directors in planning of programs, exhibits, and fundraisers.

Objective 8.1.8: Extend reach into local schools with targeted outreach and improved onsite and in school programming.

Objective 8.1.9: Develop onsite programming that is focused on enhancing the museum visitor experience.

Objective 8.1.10: Plan for the next generation of exhibits and programming.

Strategic Goal 8.2: Engage and educate the public in Arizona history by creating high-quality programs that demonstrate the relevance of the past, reach across the state, and rely on strong partnerships.

Objective 8.2.1: Foster skills in historical inquiry, analysis, critical thinking and information literacy to explore ideas, respect the diversity of human experience and make informed judgments about issues that affect our lives.

Objective 8.2.2: Create statewide teaching programs using current national models in the ways they use historic resources and the ways they form partnerships with other groups.

Objective 8.2.3: Develop and implement an overall strategy for reaching key educational target markets that includes leveraging partnerships.

Objective 8.2.4: Create relevant, vibrant exhibits and public programs that educate, entertain and engage the public in meaningful conversations about Arizona's past and how it shaped the present, and serves as inspiration for the future.

Objective 8.2.5: Expand market awareness of exhibits, programs, and educational opportunities through partnerships and co-marketing.

Objective 8.2.6: Investigate and establish a strategy that employs web-based platforms to share collections, educate students and the public, increase visibility, augment publications and exhibits, and grow meaningful collaborations.

Objective 8.2.7: Establish working relationships with area historical societies and heritage organizations, educational institutions, cultural organizations, and groups representing ethnic communities.

Objective 8.2.8: Improve upon the quality of current location-based education programs by conveying unique messages and stories about Arizona History not currently told in other museums.

Strategic Goal 8.3: Expand science education programming statewide.

Objective 8.3.1: Design and implement science education programs.

Objective 8.3.2: Use current and future exhibits to connect science education programs to exhibition themes and content.

Strategic Goal 8.4: Expand National History Day in Arizona program.

Objective 8.4.1: Increase awareness and participation in National History Day by increasing teachers, students, and regional museums participation.

Objective 8.4.2: Increase fundraising efforts around the state.

Objective 8.4.3: Work with regional coordinators in planning of programs, competitions, materials, and fundraisers.

Strategic Goal 8.5: Coordinate to provide meaningful, effective opportunities for lifelong learning.

Objective 8.5.1: Use resources effectively by establishing a institution-wide philosophy/policy on our role in lifelong learning.

Objective 8.5.2: Identify training needs of our mandated customers and create a plan to more effectively provide this training.

Objective 8.5.3: Work toward putting staff presentations and trainings online.

Objective 8.5.4: Utilize a variety of delivery mechanisms: Individuals learn in different ways.

Objective 8.5.5: Organize an experience-based approach, overseeing planning and assuring excellent quality, facilities, and customer service.

Objective 8.5.6: Create a better understanding of target market needs and interests as a foundation for better relationships and realignment of activities that will foster greater participation in AHS programs.

Objective 8.5.7: Develop and implement an interpretive plan for the entire organization that focuses on programs and exhibits that incorporate empowering intergenerational audiences with personally and culturally relevant history experiences.

Strategic Goal 8.6: Strengthen web and other media delivery of content for an education audience. (See Strategic Priority 4)

STRATEGIC PRIORITY 9: AUDIENCE REACH

AHS's future success depends on our ability to identify, please, serve, cultivate, and build our audiences. These include our members and donors, volunteers, school groups and teachers, researchers and learners of all ages (scholars, professionals, collectors, media writers and staff), family historians and genealogists, history buffs, heritage visitors, and the interested public.

Strategic Goal 9.1: Expand the audience for AHS publications through electronic publication and distribution

Objective 9.1.1: Digital publication of books and The Journal of Arizona History.

Objective 9.1.2: Increase accessibility of existing publications through digital conversion.

Strategic Goal 9.2: Assist customers in surveying, preserving, developing, interpreting, and utilizing heritage resources to facilitate economic development, community improvement, energy and other projects, heritage tourism, and quality of life.

Objective 9.2.1: Through services and relationships with partners and customers, strengthen all parties, create synergy, multiply outcomes, and further economic development.

Objective 9.2.2: Enable communities to develop and use their heritage resources to strengthen their economies.

Strategic Goal 9.3: Strengthen partnerships to more efficiently provide outreach to the general public.

Objective 9.3.1: Work with partners to identify ways to provide outreach and learning opportunities through partnerships and cooperation.

Objective 9.3.2: Strengthen and form partnerships to make events more effective, using fewer staff resources.

Objective 9.3.3: Expand our partnerships with the professional communities and state agencies that share our goals and mission.

Objective 9.3.4: Foster strategic alliances to increase access to collections, expand digital assets and research tools, and generate new revenues.

Objective 9.3.5: Develop strong brand identity and messaging for changing exhibits and their accompanying programs for Arizona Historical Society.

Strategic Goal 9.4: Create an organization that innovates naturally and frequently, adapts to the need for change, and is responsive to the community it serves.

Objective 9.4.1: Reorganize membership classifications to reflect new perceptions of membership. Include youth membership and teacher membership, for example.

Strategic Goal 9.5: Increase public awareness and support for historical records preservation and access.

Objective 9.5.1: Personalize the history experience and connect in new ways to the communities it serves.

Objective 9.5.2: Engage state and local legislative stakeholders, learning more about their goals and increasing public awareness of, and investment in, the Society's operations.

Strategic Goal 9.6: Promote AHS as a leader in the community for historical events of significant, statewide importance, teaching the lessons and legacies from these events.

Strategic Goal 9.7: Communicate effectively with our audiences both in person and virtually to provide educational, relevant, and engaging experiences in a variety of formats (lectures, family programs, special events, virtual and long- and short-term exhibitions, shopping opportunities, off-site statewide outreach, and dedicated staff and volunteers assisting researchers).

Objective 9.7.1: Target those experiences to specific audiences, focusing our resources on maximizing the value we provide to win support for our future.

Objective 9.7.2: Use targeted statewide marketing to reach our audiences, cultivate those supportive of our mission, and invite them to invest in AHS' future.

Objective 9.7.3: Optimize public awareness and participation in agency services through enhanced brand identity, web-site, marketing and outreach.

Strategic Goal 9.8: Raise AHS profile in the community.

Objective 9.8.1: Develop products/programs to be used in all AHS museums.

Objective 9.8.2: Continue regular updates of AHS Webpage with new design/structure.

Objective 9.8.3: Administer AHS Social Media networks.

Objective 9.8.4: Provide support and collaborations in the community.

Objective 9.8.5: Continue production of educational publications.

Objective 9.8.6: Create teacher curricular resources.

Objective 9.8.7: Provide workshop supplements.

Objective 9.8.8: Create textbooks and children's books.

Objective 9.8.9: Continually monitor and evaluate programs and change accordingly.

Objective 9.8.10: Develop new programs.

Objective 9.8.11: Continue professional presentations at conferences.

Objective 9.8.12: Encourage staff to attend professional development opportunities.

Objective 9.8.13: Continue presence in university classes at ASU, UA, and NAU.

Objective 9.8.14: Develop partnerships and collaborations with professional organizations and businesses.

Objective 9.8.15: Participate in professional organizations such as the American Association for State and Local History, Museum Association of Arizona, Central Arizona Museum Association, Tucson Association of Museums, Arizona Council for the Social Studies, Western Museum Association, etc.

Objective 9.8.16: Increase grant applications through professional partnerships.

Objective 9.8.17: Recruit and mentor college interns.

APPENDIX A: IT STRATEGIC PLAN

Information Technology Trends

1. Migration to cloud-based software and storage
2. Faster obsolescence of computer hardware and software
3. Rapidly accelerating digital and file-based acquisition of collections
4. Increasing volume of born-digital agency records
5. Decreasing reliance on local devices
6. Increased use of technology by users to interact with cultural content
7. Increased demand for digital content
8. Push to increase item-level metadata and curation of digital records

Information Technology Issues

1. Providing ample electronic storage that is cost effective and sustainable
2. Obtaining funding to refresh hardware and software in a planful manner
3. Obtaining funding for IT system support (internal and external)
4. Determining which developing technologies best meets future needs of organization

Agency Business Goals

1. Collect, preserve, interpret and provide access to materials documenting the history of Arizona
2. Engage the public in discovering and preserving the history of Arizona
3. Expand access to the AHS historical collections and resources
4. Provide educational tools and programming to students, teachers and the general public

Information Technology Plan

IT Vision

A robust Information technology infrastructure to provide a foundation for the delivery of content and services across multiple, changing platforms and devices. An IT infrastructure that is flexible, secure, and scaleable - enabling innovative uses of technology for educational and customer service excellence.

IT Mission

Working without an IT department or staff, the AHS staff works to develop IT plans and projects to strengthen IT infrastructure in order to improve and enhance digital and online information resources; adopt new technology before the existing systems become antiquated; and provide all AHS customers with fast and courteous service in an ever changing technology environment.

Goal #1 – Implement cost-effective solution to meet the storage, access and collaboration needs of the agency.

Objective #1 – Replace on-site file servers with cloud-based storage.

Current Situation – AHS has approximately 1.5 TB of agency records stored across two on-site servers and 7TB of historical records stored on multiple external hard drives.

Mainstream support for the two Windows 2008 servers ended on January 13, 2015; with extended support ending on January 14, 2020. In 2015 the AHS joined the state domain

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allowing the staff at the four AHS locations (Flagstaff, Tempe, Tucson, Yuma) to access files on the servers. Combined the two servers have less than 1TB of available storage space. The 7TB of historical records relate to the museum and archival holdings – primarily digital surrogates of physical collections, but also includes born-digital collection material. Stored on external hard drives, access to the files is limited.

Objective #2 – Move to web-based applications to allow access from multiple devices and locations.

Current Situation - AHS has three mission critical applications on an on-site server. The application server is also a Windows 2008 server. As stated above mainstream support by Microsoft ended on January 13, 2015; with extended support ending on January 14, 2020. Access to the applications is limited to on-site use.

Related Project: Phased migration to cloud storage beginning in FY2017. The rapidly increasing volume of digital agency and historical records requires investment in easily scalable file storage. With agency staff at multiple locations around the state file access and sharing using mobile devices is crucial. Equally important is the ability to conduct work in various locations. By increasing reliance on mobile devices and reducing reliance on location based devices, agency staff can accomplish work no matter the location. Estimated cost for storage per year: **\$30,000**

Goal #2 – Develop information technology procedures, practices and budget to efficiently and effectively manage IT assets.

Objective #1 - Develop and implement budget for agency wide technology support

Objective: #2 - Implement 3 year computer refresh cycle to insure secure and accessible system

Objectives #3 - Reevaluate existing and identify new critical technology policies for the agency

Current Situation – The computer refresh completed in 2015 provided uniform computer technology across the agency and removed all computers running Windows XP or Windows Vista. All computers are now running the Windows 7 operating system. As with the servers, mainstream support by Microsoft ended on January 13, 2015; with extended support ending on January 14, 2020 – requiring an upgrade of all computers in the agency. The Windows 10 operating system was released in July 2015 making Windows 7 a version behind.

Related Project: Computer refresh in FY2018-19. Upgrade all computers, monitors and software to avoid system obsolescence. Refresh will allow agency to continue to perform mission services in timely and effective manner. Estimated cost: \$120,000 divided over two or three years.

Goal #3 – Improve and enhance the use of information technology to enable innovation in teaching, learning, research and scholarship

Objective: Investigate and establish a strategy that employs web and media platforms to share collections, teach students and general public, increase visibility, and augment exhibits and publications.

Objective: Develop Digital Initiatives Manager position to manage information technology initiatives planning, implementation, and monitoring of digital projects to enhance user experience and improve workflows within the agency. This includes, but is not limited to,

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digital initiatives such as digital curation and preservation, digital exhibits, the website, and search and discovery of library resources.

Related Project: Hire Digital Initiatives Manager to build capacity for use of information technology within the museums and archives and educational programming. The manager can seek grants and increase revenue through coordinated AHS projects. Estimated cost of the position is \$66,000 - \$90,000 (salary+ERE).