

# **Sharlot Hall Museum**

## **Strategic Plan (2020-2025)**

### **Background and Introduction**

In furtherance of sound managerial practice to guide and focus the Museum’s day to day, and future activities; this plan has been produced as an implementable roadmap. This plan has been developed as a collaborative effort between the governing Board of Trustees, the Museum’s Executive Director, and staff. Additionally, it was reviewed by a select set of private and public community stakeholders including elected city and county officials, public and private organizations, educators, and professional service providers. Those associated comments and recommendations have been incorporated into the plan, where appropriate.

### **A Brief History**

The Sharlot Hall Museum was founded in 1928 and is located on the grounds of the log building that served as the residence and office of the first governor of the Arizona Territory. The nearly four-acre, landscaped campus features ten exhibit buildings, including four restored historic structures representing Arizona’s territorial era—the Governor's Mansion (1864), Fort Misery (1864), the Fremont House (1875), and the Bashford House (1877). The Lawler Exhibit Center (1977) hosts both permanent and changing exhibits, and storage of extensive historic and prehistoric objects. A large Research Center (1993), houses several hundred thousand images, maps and documents. A new support facility constructed with non-State of Arizona funds was completed in March 2013, and a new admissions building, also financed entirely with privately-donated funds was added in April, 2014. The newest addition to the campus, is the Education Center, also financed entirely with non-State funds. Completed in 2020, the Education Center is a multi-function, state of the art, facility containing a re-configurable theater/presentation room with a capacity of 130 people; nearly doubling the Museum’s capacity for historical presentation programs. Other class rooms or break-out rooms of varying size are also re-configurable. The Center also is equipped with a full-sized catering kitchen, allowing full hosting services for potential income generating facility rental to outside groups and organizations seeking meeting venues for off-sites/seminars/special events. Public programs include the annual Folk Arts Fair,

Prescott Indian Art Market, Folk Music Festival, Frontier Christmas, Western History Symposium, occasional musical and theatrical historical productions, living history interpretations in both indoor and outdoor settings, heritage gardens, lecture series, educational tours, and outreach opportunities for children and adults. The Museum also operates a branch museum at the Bob Stump VA Medical Center which interprets the history of Fort Whipple.

The Museum is operated by the Prescott Historical Society (PHS), an Arizona state agency established in 1965 for that purpose. The PHS receives an annual appropriation from the state legislature, which amount is augmented by the financial support provided by its non-profit partner, the Sharlot Hall Historical Society (SHHS).

## **Mission, Vision, and Values**

### **Mission**

Sharlot Hall Museum is an educational and cultural center, which fosters public and community understanding and appreciation of historical, social, cultural and natural aspects of Arizona, with emphasis on the Central Highlands, and which promotes involvement in and support for research, collections, conservation, exhibits, and related programs.

### **Vision**

To serve as a respected historical center offering experiential approaches to exploring Arizona's past, illuminating its present and imagining its future in order to educate, enlighten and enhance the experience of Museum visitors.

### **Values, Behaviors and Objectives**

The Museum operates with the highest ethical standards. It embraces truth and the pursuit of knowledge and recognizes the importance of aesthetic considerations. The Museum acknowledges the contributions of diverse cultural and ethnic groups to the area's historical development.

In operating within the framework established by such values, the Museum:

- collects items of historical significance
- preserves and interprets its collections
- upholds scholarly and professional integrity
- makes best use of its resources
- promotes continuous learning
- strives to be innovative and creative
- anticipates and responds to its diverse audience needs

## **Objectives and Strategies**

**I. Objective 1—Financial Stability.** Sharlot Hall Museum is committed to sound and responsible stewardship of the public resources to ensure that it can continue to provide members and visitors with an educational and cultural experience consistent with its mission.

### **a. Strategies**

- i. Maintain, strengthen and expand public support for the Museum through communication and outreach programs.
- ii. Provide for a sustainable stream of operating revenues:
  1. Increase earned income from all sources, including memberships, admissions, rentals, museum store, Research Center sales, festivals, Education Center rentals, and other fund-raising activities.
  2. Increase the donor base of members, volunteers and friends of the Museum.
  3. Continue to explore the potential for additional lease/rental opportunities for the Museum's grounds and facilities.

4. Invest the reserve funds with the balanced purposes of meeting budgeted and unplanned expenses, and providing for long term stewardship.
  5. Expand corporate membership program through the active engagement of staff and members of the Board of Trustees.
- iii. Expand resource development activities.
1. Retire the debt associated with completion and outfitting of the Education Center.
  2. Retire the debt associated with construction of a visitor orientation center in the foyer of the Lawler Exhibit Center.
  3. Beginning in 2022, commence a capital campaign to fund the design, construction and installation of new permanent exhibits in the Lawler Exhibit Center pursuant to the Museum’s Exhibit Plan.
  4. Identify potential sources of major capital gifts for operational support, exhibit renovation and expansion, and other projects.
  5. Continue to engage Museum staff and Board members as well as other resources in developing and establishing a reliable stream of financial support for the Museum.
  6. Maintain, strengthen, and expand relationships with governmental funding sources with the objective of ensuring levels of funding that match or exceed FY21 values.
  7. Evaluate, and implement other initiatives for proactively engaging city, county and state representatives, such as tours, briefings, receptions and related activities.

**II. Objective 2—Capital Planning.** Sharlot Hall Museum’s Exhibit, Facilities and Space Utilization Plans describe the facility changes, renovations, and required upkeep to accommodate the present physical plant and future growth. The Museum’s growth and development are limited by its financial and physical resources. Capital planning entails an evaluation of its facilities with the object of optimizing their productivity, utilization and strategic application to ensure that facilities will meet the needs of the Museum campus and community, now and in the future.

**a. Strategies**

- i. Retire the debt associated with construction of the Education Center on the southeast corner of the Museum campus.
- ii. At least biennially, review and modify, as needed, the Museum’s Space Utilization Plan dated October 11, 2019.
- iii. Continue to pursue State building renewal funds for Museum Projects, including, among others, the replacement of the roofs on the Governor’s Mansion, the Gazebo, and a Summit Street rental property; as well as the resurfacing of the Granite Creek Center parking lot.
- iv. Fund and install technology accommodating the delivery of customized guest audio to exhibit buildings that are not currently staffed by a volunteer docent.
- v. At least biennially, review and modify, as needed, the Museum’s Lawler and Sharlot Hall Building’s Exhibit Plan dated August 15, 2019 with consideration of the application of new technology. [See Objective V]
- vi. Annually, review and modify, as needed, the Capital Improvement and Maintenance Plan for the Museum’s Facilities and Grounds dated August 27, 2019; assuring specific sources of funding are identified.

**III. Objective 3—Collections Stewardship.** The Museum holds more than 40,000 objects and several hundred thousand documents, images, maps and recorded histories in trust for the people of Arizona and the general public. The management of this collection, including documentation and preservation, is vital to the mission of the Museum.

**a. Strategies**

- i. At least biennially, review and modify, as needed, the Museum’s Collections Management Plan dated September 26, 2017, and reviewed without modification in September 2019, ensuring that all aspects of the collection are well-defined and consistent with professional standards.
- ii. Complete an inventory of all three-dimensional objects in the collections and, in the process thereof, refine and focus collections to (a) reduce duplication and (b) evaluate opportunities to deaccession non-mission

related items. Continue the process of placing selected three-dimensional objects on the Museum website.

- iii. Review and update the Museum's Disaster Plan dated March, 2017; including consideration for the current COVID-19, and future pandemic operations. Thereafter, review and update the plan biennially.
- iv. Implement as appropriate, technology for providing public on-line access to archival documents. Assure restrictive conditions, where applicable by policy, are clearly and prominently displayed, when public access is attempted.
- v. Complete the development of an informative and user-friendly website for the Museum and its research needs, which can be regularly updated, edited and maintained by Museum staff.
- vi. Process to completion all documents, photographs, maps and other items in the Research Center collections; update finding aids in compliance with *Describing Archives: A Content Standard* (DACS), the content standards adopted by the American Society of Archivists, and determine legal rights with respect thereto.

**IV. Objective 4—Programming, Exhibits and Education.** The Museum is dedicated to excellence in education as its exhibitions, programming and other educational activities are vitally important to its mission. The goal of these activities is to provide a fun and enjoyable Museum experience by offering educational opportunities that excite, enrich and engage a diverse public and a broad range of ages.

**a. Strategies**

- i. Continually evaluate the relevance and effectiveness of the Museum's festivals, events, lectures, living history and education programs, fundraisers, and related activities, and modify, eliminate or add to, as appropriate.
- ii. Continue to implement and improve the Museum's Education Plan, with increased emphasis on K-12 school activities, tours, education programs including guest speakers, mini museum travelling trunks, historical videos, and youth-oriented activities; employing, as appropriate the applicable and

evolving state educational standards for Arizona history and social sciences, as well as hands-on learning activities.

- iii. Fund, and continue to review, revise and implement the Museum's long-range Exhibit Plan.
- iv. Evaluate and implement, as appropriate, opportunities to utilize technology in new and existing exhibits, educational programs and volunteer training.
- v. Develop a plan designed to expand public awareness of the research opportunities offered by the Museum's Research Center.
- vi. Continue to fund and promote the Education Department's intern programs.
- vii. Explore opportunities to expand the Museum's collections, including its archival materials.
- viii. At least biennially, review and update, as appropriate, the Museum's volunteer recruitment and training program with the objective of fully staffing the Museum's volunteer support requirements.
- ix. When appropriate, utilize and integrate the Museum's collections into educational programming, including school tours, youth activities, public events, and outreach programs.
- x. Design and implement an outreach program that utilizes Museum resources that engage K-12 students and other organizations to foster interaction with students and the community, and create a foundation for future engagements with the Museum. Establish a K-12 focused area on the website and begin to populate it.
- xi. Develop and implement plans for the long-term sustainability of the Museum's festivals, including the Folks Arts Fair, Prescott Indian Art Market, Folk Music Festival, and Frontier Christmas events.

**V. Objective 5—Informational Technology.** The challenge for museums of the 21<sup>st</sup> century is to enhance the visitor experience beyond merely observing relics of the past. The integrated use of new and emerging technologies enables Museum visitors to engage more functionality and experientially, thereby providing an enriched educational and cultural experience.

**a. Strategies**

- i. Evaluate the utility of, and, if appropriate, fund and install, a dedicated local-area Wi-Fi network, to enable visitor access to expanded audio/visual, multimedia and textual information on selected exhibits throughout the campus through the utilization of their own electronic devices; e.g., smart phones, tablets and laptops.
- ii. Perform a cost optimized analysis of new and emerging technology to develop and implement user-friendly customized interactive audio/visual presentations for new and existing exhibits; evaluate the utility of including animations, and 3-D holographic, digitally enhanced projections of persons and events related to the exhibit.
- iii. Utilize engaging multimedia and audio/visual I.T. tools to provide information and entertainment content – an “infotainment” presentation style to Museum markets and audiences.
- iv. Explore developing a program that utilizes 3D-printer technology to support educational and other programs.

**VI. Objective 6—Partnerships.** The development of political, economic and organizational partnerships is vitally important to the Museum’s dual efforts to provide quality of life experiences for the community and to serve as a regional economic generator through civic tourism.

**a. Strategies**

- i. Maintain a high profile with state, county, and local governments to assure tax-based funding.
- ii. Maintain and expand partnerships with community businesses, leaders, and others to encourage support of and engagement with the Museum.
- iii. Maintain and expand partnerships with complementary institutions/entities which offer learning and coalition building opportunities, including:
  1. Indigenous tribal entities
  2. Arizona Historical Society
  3. Local historical museums and organizations
  4. Local community service clubs
  5. Educational institutions

6. Yavapai County Library District

**VII. Objective 7—Marketing, Public and Media Relations.** The Sharlot Hall Museum can only fulfill its mission if its audiences are aware of its existence and the many opportunities and rewards available. Wide ranging efforts to publicize and promote the unique nature of the extensive quality offerings of the Museum remain at the foundation of sustainability.

**a. Strategies**

- i. Develop and implement a solid on-going public relations, marketing and promotion plan, utilizing cost-effective communications tools, techniques and strategies, including:
  1. The utilization of the website as a platform for communicating our mission, our collections and exhibits, and our offerings with respect to cultural and educational programming, public events and digital learning; and
  2. The utilization of the digital tools and social media platforms that provide outreach opportunities to market the Museum’s programs and events to new audiences.
- ii. Continue to foster strong relations with local and regional media; develop and exploit relationships with media in large city media markets, e.g. Phoenix and its surrounding areas.
- iii. Evaluate and implement, as appropriate, the use of surveys and other means to obtain input from members and visitors.
- iv. Gather, compile and analyze demographic data provided through admissions and implement and evaluate such other surveys of members and visitors to identify target areas for expanded marketing activities.

**VIII. Objective 8—Human Resources.** A major challenge for the Museum over the next several years is to address the effects of an aging management team and the inevitable loss of years and even decades of expertise and institutional knowledge. It is anticipated that within the next 3 years, if not sooner, five of the eight key management employees, including the Executive Director will retire. Prudent management dictates that these human

resources issues be addressed by the Board of Trustees and the Executive Director. Moreover, in recognition of the fact that personnel requirements are influenced by changing operational circumstances and other causes, a long-term evaluation of such needs is in order.

**a. Strategies**

- i. The Board of Trustees, with input from the Executive Director, will develop a plan for the succession of the Executive Director in the event he should become incapacitated, die or retire.
- ii. The Executive Director, with input from staff, will develop a plan for the succession of other key management employees in the event of their incapacity, death or retirement. The staff succession plan shall be updated each time an identified key management employee leaves.
- iii. The Executive Director, with staff input, will develop a needs-assessment for Museum staffing associated with long-range criteria, taking into account existing expertise, anticipated growth and projected changes in operational circumstances.

## **Implementation Plan**

The Implementation Plan for the individual Strategies articulated herein is attached, as an appendix. The first page (tab) of the appendix is a summary outline of each Strategy showing the organizational responsibility and support for each task, as well as funding source(s), timeline, and a task number identifier associated with the detail of each strategy implementation. Each task will have an assigned person responsible for implementation detail and status. The responsible person will, in coordination with the Museum Executive Director, determine and execute the necessary steps to achieve the task objective(s). Additionally, the task leader will provide progress status periodically, as determined by the Executive Director. Status shall be based on measurable attributes (relevant metrics). The Executive Director shall review the status of the Strategic Plan biannually, with the Board of Trustees.

**Adopted by the Boards of Trustees of the Prescott and Sharlot Hall Historical Societies on November 24, 2020**

