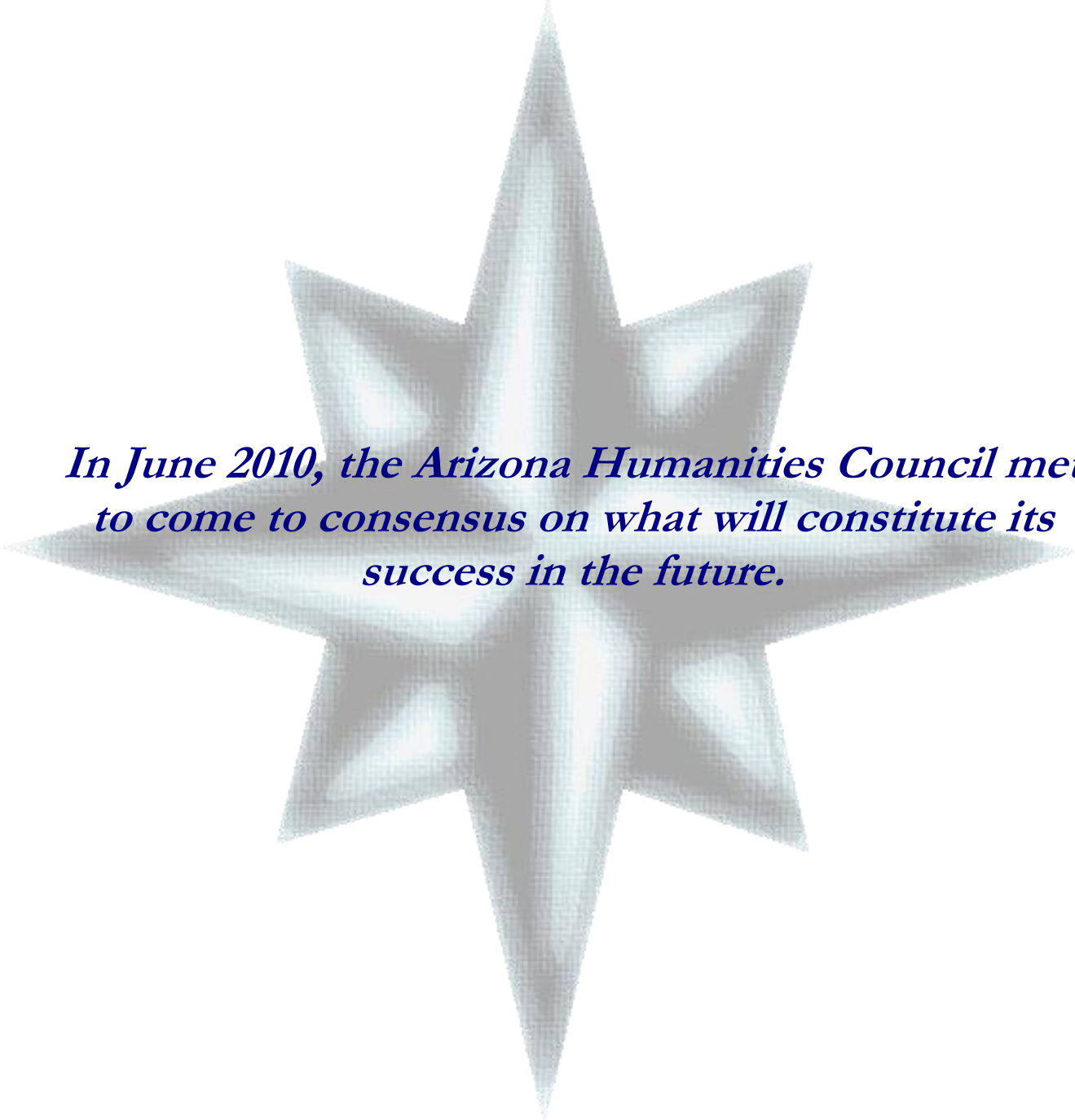# THINKING & PLANNING STRATEGICALLY

In June 2010, the Arizona Humanities Council met to come to consensus on what will constitute its success in the future.

This is that direction...

TABLE OF CONTENTS

O VERVIEW

On June 18, 2010, a strategic planning group consisting of Board members and senior staff of the Arizona Humanities Council (AHC) met to update its long-range strategic direction. Bud Crouch, a principal partner of Tecker Consultants, LLC and president of Innovations Plus led the group through the planning process.

This planning document defines AHC's clear strategic direction. It is the planning group's consensus on what will constitute the Council's future success. It answers the following two fundamental strategic questions:

1. Why will AHC exist in the future? *Its reason being and core purpose.*

2. Where is AHC going? *Its future direction and goals.*

Planning Strategically:

The existence of this strategic direction and its successful implementation signals the leadership team's desire to lead AHC strategically. Developing a strategic direction is not a one-time event, but an ongoing commitment and process. The strategic direction represents a compass that will be used to guide and focus AHC's future strategic decision-making and ongoing operational work.

Strategic Focus:

Organizational strategic focus or intent is very important. One of the challenges that AHC faces is the fact that there is more it can do than it has resources to accomplish. The temptation to do everything can lead an organization to try to be all things to all people. Planning strategically is the counter to the all-things syndrome. It is about identifying a limited number of goals that AHC must undertake to move successfully into the future.

Strategic Approach/Philosophy:

The approach in defining the new strategic direction was not to identify what AHC wants to continue doing today (its current operational plan). Rather, the team determined what the organization is not doing today, but must engage in to be successful in the future.

This strategic direction is not about business as usual — **it is about the change needed to stay relevant!** This separates the strategic plan from the operational plan. Both are important. The strategic direction is a constant reminder, as the leadership team oversees the development of the annual operational plan, of what must be changed to stay relevant to what member are seeing in their real world.

Updating the Strategic Plan:

A strategic plan can only stay current and relevant if AHC insures that the plan is updated. It is the leadership team's *working document.* Therefore, the governing body has both the right and the responsibility to:

1) change the strategic plan anytime it needs to be changed based on sound reasoning and assessment; and

2) Update the plan regularly on an ongoing basis.

A 10 to 30 year planning horizon was developed, which consists of AHC's core ideology and 10 to 30 year envisioned future.

Core Ideology/Mission clarifies what must be preserved in an environment of increasing rapid and unpredictable change. Core ideology consists of AHC's core values and core purpose.

The **core purpose** describes AHC's very reason for being or existing — *why the organization will or should exist into the future* (10 to 30 years). What would be lost if it ceased to exist? What sense of purpose will motivate members to dedicate their creative energies to AHC and its efforts over a long period of time?

AHC's Mission ➤ *To think about and enrich our shared human experience.*

Core values are a small set of timeless, guiding principles that do not require external justification. They only have intrinsic value and importance to AHC. Core values are so fundamental that they seldom change — *if at all.* They define the behavior required in order for the organization to achieve its core purpose. Core values are so deep-seated and valid that AHC would preserve the core values even if it were admonished for having these values.**'s Core Purpose**
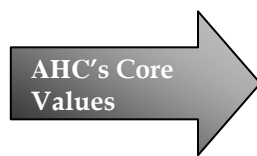
AHC's Core Values ➤ *We believe in:*

- *Respecting and valuing each other*
- *Acting ethically*
- *Sharing diverse perspectives*
- *Collaboration*
- *Open and honest communication*
- *Accountability*
- *Critical thinking*
- *Civic engagement*
- *Being Informed*

The **10 to 15 year envisioned future** consists of a single, **big audacious goal (B.A.G.)** *or vision*. The B.A.G/vision is a goal (that is AHC's vision statement) that stretches beyond its current three to five year goals. Because it is "audacious" it represents a significant challenge and its achievement will require AHC to move outside of its comfort zone. It is clear and compelling to all members. It has a clear finish line which will take both time and a hard work to accomplish. The goal should stimulate leadership activity, commitment and participation beyond AHC's present leadership. It helps to set the direction for the succession of future three to five year strategic plans.

AHC's B.A.G.   ➡   *AHC will be the recognized advocate for creating awareness and advancement of the humanities.*

A vivid description helps to clarify what is intended by the goal. It describes what AHC will look like when it successfully completes its Big Audacious Goal. It also provides measureable achievements (milestones).

Arizona Humanities:

- Will become part of the education system's core curriculum in Arizona.
- Will enjoy increased public support and awareness.
- Will promote increased civil discourse and critical thinking.
- Will increase AHC's demographic and geographic reach

AHC will:

- have a larger endowment.
- be sought out by political and business leaders for advice.
- have greatly increased its brand awareness.
- have increased funding sources that are more diverse.
- strong collaborations and partnerships with other organizations.

Strategic 3 to 5 Year Goals

The following represents AHC's goals that encompass its three to five-year direction. These goals are outcome-oriented statements that lead AHC towards its envisioned future. These goals are not in any order of priority. All of the goals will need to be accomplished, if AHC is to fully achieve its three to five-year quest.

In 2016:

Goal A: **AHC will be the people of Arizona's indispensible resource that further expands the awareness of the humanities (Value proposition).**

Goal B: **AHC will have financial capacity independent of NEH (Financial Viability).**

Goal C: **AHC will be branded as the Voice for Humanities throughout Arizona (Branding).**

Goal D: **AHC will form strategic partnerships, relationships and cooperative ventures with other organizations that complement the humanities. (Resources).**

Goal E: **AHC will evaluate and align its infrastructure (process and structure) to successfully implement its strategic plan. (Implementation)**

LONG-RANGE GOALS & STRATEGIES

Strategies indicate how AHC will organize, focus and expend its resources and actions to maximize its effectiveness and efficiency in achieving its three to five year goals. The strategies must be reviewed and updated on an annual basis.

The strategies were rated in importance of when they should be undertaken (implementation timing). The three ratings include:

High: *Work on this strategy must be undertaken in the next program/fiscal year.*
Medium: *Work on this strategy should be undertaken in the next program/fiscal year if at all possible.*
Low: *Work on this strategy can wait until a subsequent program/fiscal year if necessary.*

Indicators of Achievement are used to determine the overall progress toward a goal. They indicate how close AHC is to achieving a goal as it executes the individual strategies for each goal. **The indicators of achievement measure goal achievement, not strategy achievement.**

Goal A: *AHC will be the people of Arizona's indispensible resource that further expands the awareness of the humanities.*

Strategies:

- **(High)** Establish signature events.

- **(High)** Establish themes for programming and events.

- **(Medium)** Provide professional development for teachers to infuse humanities into the classroom.

- **(Medium)** Refine AHC brand.

Indicators of Achievement:

- An increase in:

    ⇒ humanities activities and events.

    ⇒ public requests for humanities projects, materials and information.

    ⇒ public awareness of AHC and its brand.

- The existence of:

    ⇒ a professional development program for teachers.

    ⇒ two new signature events and themes a year.

Goal B: *AHC will have financial capacity independent of NEH.*

Strategies:

- **(High)** Create an integrated, long-range financial development plan that includes.

    ⇒ a strong focus on revenue diversification.

    ⇒ media kit showcasing AHC

    ⇒ prospect development strategies.

    ⇒ establish an endowment.

    ⇒ strategies to grow planned giving (including bequests, annuities, and trusts).

    ⇒ a gifting policy.

    ⇒ increased corporate support, in-kind donations, individual donations

    ⇒ increased earned income.

- **(High)** Align AHC's infrastructure (both processes and structure) to support the long-range financial development plan, including:

⇒ creating a financial development committee, and

⇒ defining board overview responsibilities.

- **(High)** Diversify fundraising methods (e.g. social media, etc.).

- **(Medium)** Review capacity building items for completion.

- **(Medium)** Prepare for new feasibility study.

Indicators of Achievement:

- An increase in:

    ⇒ overall net revenue of all types.

    ⇒ financial viability.

    ⇒ overall contributions.

- The existence of.

    ⇒ a long range financial development plan and the infrastructure to support it.

    ⇒ an annual business/operational plan and budget.

    ⇒ diverse revenue resources.

    ⇒ an endowment

Goal C: ***AHC will be branded as the Voice for Humanities throughout Arizona.***

Strategies:

- **(High)** Arizona Annual Film Festival

    ⇒ develop a travelling film festival kit with moderator posted on AHC YouTube channel.

- **(High)** Develop a public relations brand kit for road scholars' proper evaluation (i.e., poster, brochures, banner, digital CD with logo, harvest dollars box - donation box).

- **(High)** Upgrade AHC's website.

- **(Medium)** Publicize NEH funding of non-AHC programs, people or organizations.

- **(Medium)** Partner with the Arizona Education Association and the Arizona Department of Education.

Indicators of Achievement:

- An increase in:

    ⇒ public contact for humanity information.

    ⇒ positive media contact and coverage.

    ⇒ governmental contact.

    ⇒ educational (individual and institutions) at all levels contacts.

    ⇒ interactive hits on the website looking for information.

- ⇒ win-win partnerships.
- ⇒ significant opportunities for AHC to carry out its mission in the state and beyond.
- The existence of:
  - ⇒ an upgraded website.
  - ⇒ a public relations brand kit.

Goal D: *AHC will form strategic partnerships, relationships and cooperative ventures with other organizations that complement the humanities.*

Strategies

- **(High**) Develop collaborations and partnerships by:
  - ⇒ expanding AHC's outreach to different scholars, audiences and venues.
  - ⇒ looking in AHC's own backyard (e.g. every grant is a partnership)
  - ⇒ refine grant approach to limit repeat grantee awards and funding cycles.
- **(High)** Develop a needs assessment process as basis for forming collaborations with interested parties.
- **(Medium)** Develop criterion for determining the degree of collaboration.

Indicators of Achievement:

- An increase in:
  - ⇒ AHC's ability and resources to carry out its mission.
  - ⇒ successful strategic partnerships.
  - ⇒ joint ventures with partners.
  - ⇒ AHC's outreach and resources.

The existence of:
  - ⇒ criterion determining the degree of collaboration.
  - ⇒ a needs assessment process for forming collaborative efforts.

Goal E: *AHC will evaluate and align its infrastructure (process and structure) to successfully implement its strategic plan.*

Strategies

- **(High)** Revisit Ellis Shackelford House as a functional staff HQ's and how it aligns to AHC's mission, values and brand including the need to:
  - ⇒ review its functional capacity, efficiency, safety.

⇒ review the house's role in fulfilling AHC's mission.

⇒ lobby key city officials for use of the whole house.

⇒ Assess feasibility/appropriateness of fundraising for renovations for non-AHC owned property

- **(High)** Review of AHC's organizational infrastructure and organizational chart.

- **(High)** Review and update accordingly.

- **(High)** Review/analyze all AHC programs.

Indicators of Achievement:

- An increase in:

    ⇒ effectiveness and efficiency of implementing AHC's new strategic plan.

    ⇒ staff performance.

    ⇒ AHC positive branding.

    ⇒ the number of volunteers.

    ⇒ net revenue.

- A decrease in:

    ⇒ costs and expenses.

    ⇒ safety hazards.

- The existence of:

    ⇒ a renovated house or functional office space.

    ⇒ upgraded technological capacity and efficiency.

The respondents identified the following assumptions about the most significant, future (two to seven years) external conditions, trends and major forces, etc. that they believe will impact humanities in Arizona.

Financial:

1. Seeking and finding funding is a constant issue and is a challenge in this poor economy, including:
    a. There are political organizations in Arizona that do not support public funding for education, and are hostile to AHC's mission to promote education and understanding of different cultures.
    b. There is a new ban on ethnic studies.
    c. There is legislation on the November 2010 ballot to ban public funding of educational scholarships for women and minorities and to end equal opportunity in employment and government contracting.
2. There may be a decline in public support of the humanities as the global economy continues to stagnate.
3. The current economic environment has caused a decline in state, federal and individual funding.
4. The public we serve is also impacted by the economic downturn.

Technology:

5. The use and availability of technology (social networking) represents one of the most significant external opportunities for the humanities.

Governmental:

6. Governmental challenges regarding humanities include:
    a) government deficits,
    b) increased immigration,
    c) divisiveness in political process facilitated by biased media reports,
    d) poor governmental policy making at national and state levels, and
    e) overall dissatisfaction with state and federal government.
7. The increase in political extremes that demand a canon of history and literature that are more propaganda of an ideology than an attempt to find truth and universal human values.
8. The above factors, while a challenge, present an opportunity for AHC to step up, with a strong voice in opposition, and with targeted programming. We can play a role in shaping public attitudes and policy, and making sure that the next generation of leaders is not as ignorant as the present.

Immigration:

9. Border and immigration strategies and how they affect Arizona are major issues.
10. The influence of far-right political and social ideology, such as recent Arizona legislation regarding illegal immigration and ethnic studies is a challenge.

Relationships:

11. Social networking media is changing the face of communications and the building of relationships worldwide.
12. The rapid development of strategic alliances will present both opportunities and threats to the advancement of humanities.

Education:

13. There are new humanities programs targeting youth.
14. There is a lack of good social studies in schools.
15. Unemployed humanities scholars are being forced to leave the field.
16. A challenge is the potential nationwide impact of Texas textbook revisions that rewrite history and diminish the accomplishments of women and minorities.
17. Ethnic studies are under attack in university curriculums and are banned in some public schools.
18. There is lower educational achievement on the part of the general public whose knowledge about humanities is limited.
19. With education budgets under attack, the humanities will suffer as an educational priority.

Other:

20. There is a worldwide lack of clarity in definition of *humanities*.
21. A significant challenge is keeping humanities relevant.
22. Current supporters of AHC will be replaced by a generation with very different demographics, institutions, methods of communications and ideas. We need to meet the challenge of serving this group by addressing their needs now and not waiting until we are forced to change.

Mega issues are overriding issues of strategic importance that cut across multiple goal or outcome areas. They address key strategic questions that AHC must answer, illuminating choices that the organization must make and challenges that need to be overcome to better serve its audience, fulfill its purpose or mission and to successfully move into the future. The respondents identified the following mega issues.

Strategic Direction:

1. What are AHC's future mission and goals as AHC moves into the 21st century?

2. How will AHC expand its reach (demographically & geographically) and become more relevant to diverse populations and various age groups?

Financial and Fundraising:

3. In what way can AHC best develop a comprehensive and diversified fund raising strategy that includes developing an 1) overarching integrated business strategy and 2) an endowment?

Branding and Awareness:

4. How does AHC create increased brand awareness, public support and recognition for its contributions as the advocate for the humanities in Arizona?

5. How will AHC increase its influence on decision-making by government and statewide agencies concerning humanities issues?

Education and Programs:

6. What three or four key priorities can AHC focus on for programming and funding initiatives?

7. How does AHC bring the organization's infrastructure and technology up to date?

8. How will AHC expand its programming to reach younger and intergeneration audiences through social media and networking?

9. How can AHC accurately access the qualitative impact of its programs on individual lives and the public's behaviors?

Technology:

10. How can AHC better utilize technology to enhance the quality and quantity of its offerings?

Relationships:

11. How does AHC better collaborate with other organizations, both locally and nationally to build coalitions and identify grant opportunities?