

# Clarkdale Historical Society & Museum

## Strategic Plan

2019-2023



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## Background and Development of the Strategic Plan

The Clarkdale Historical Society and Museum (CHSM) is a non-profit, 501(c)3 organization that was established for the purpose of managing an historical museum housed in the town's old clinic building whose staff served smelter workers and their families. In addition, the organization sponsors several events and provides other services designed to preserve and celebrate Clarkdale's rich history. Among these are the Annual Historic Building and Home Tour, the Historic Reenactment of the 1928 Clarkdale Bank of Arizona Robbery, the popular "First Fridays, In Their Own Words" program and public tours of the 1926-27 Clarkdale Clubhouse.

With the advent of CHSM's 10<sup>th</sup> anniversary in September of 2018, the board of directors determined that a strategic plan needed to be developed to help ensure the sustainability and positive progress of the organization. Subsequently, the board hired Dr. Marshall Whitmire to assist the organization in developing such a plan. The people whose names are listed below were appointed to an eight-member planning team. All of them deserve great thanks for their thoughtful, passionate and diligent work.

Bill Regner, Member, Clarkdale Town Council

Cindy Emmett, Chair, CHSM Board of Directors

Debbie Hunseder, Member, Clarkdale Town Council

Isabel Erickson, Member, CHSM Board of Directors

Michael Lindner, Clarkdale Native and Local Historian

Michelle Dermo, Member, CHSM Board of Directors

Rae Pellegatti, Member and Archivist, CHSM

Wes Yeager, Manager, Jerome State Historic Park

During a four-month period, the team, using a consensus-oriented planning process, produced this strategic plan to guide the operation and development of CHSM for the ensuing five years. The value and effectiveness of their work will be determined by the extent to which the plan is embraced and faithfully implemented by current and future boards of directors. At the same time, needed modifications to the plan are inevitable as conditions change and new information becomes available. Accordingly, the plan should be reviewed and updated at least every two years.

March 2019

## Mission and Vision Statements

### Mission

Through its collections, public programs and preservation activities, the mission of CHSM is to foster a deep understanding and appreciation of Clarkdale's and the region's rich history as well as support economic development and contribute to a higher quality of life for its citizens.

### Vision

Clarkdale, Arizona's first master-planned community, is nationally recognized for preserving and celebrating its rich history as a fundamental part of its identity, economic development and quality of life.



## Organizational Strategies

These organizational strategies are long-term, essentially timeless macro-goals that CHSM must constantly pursue in order to be successful.

1. Establish and maintain collaborative working relationships with other Verde Valley historical societies, the Arizona Historical Society, the State Historic Preservation Office, Arizona Humanities and other similar organizations that complement and can support the mission and work of CHSM.
2. Develop and maintain a strong and ongoing working relationship with the Town of Clarkdale.
3. Monitor Clarkdale's economic and community development plans and initiatives and clearly tie the role and work of CHSM to those plans and initiatives wherever and whenever possible.
4. Utilize a broad range of communication and marketing strategies to communicate the organization's role, programs, events and volunteer opportunities to the widest possible local (regional where appropriate) audience.
5. Continually strive to further professionalize the work of the organization by identifying and recruiting well-qualified and experienced volunteer talent and upgrading museum practices and procedures to the highest possible standard.
6. Continually develop and pursue a broad range of funding sources and strategies needed to meet the financial needs of the organization.

## Priority Goals <sup>1</sup>

1. Significantly increase the number of trained staff available to assist CHSM in achieving its mission. (I=38, U=37, T=75)
2. Secure the funding necessary to meet the short- and long-term needs and goals of the organization. (I=35, U=36, T=71)
3. Continue, optimize, add and upgrade museum exhibits, programs and operations. (I=36, U=32, T=68)
4. Formulate and implement marketing strategies that strengthen public and potential large donor knowledge and appreciation of Clarkdale's history and CHSM's role in preserving and celebrating that history. (I=30, U=29, T=59)
5. Substantially enhance and accelerate work to inventory and digitize, as appropriate, documents and other historic assets owned by CHSM or for which it assumes responsibility. (I=29, U=29, T=58)
6. Stabilize and professionalize the operation of CHSM. (I=26, U=25, T=51)
7. Develop and implement a program that supports the preservation and renovation of Clarkdale's historic built environment, including development and submission of applications to the National Register of Historic Places. (I=26, U=23, T=49)
8. Acquire a larger museum building that provides adequate space needed to securely house, curate and display the museum's collections, and that may provide improved visibility for visitors. (I=24, U=15, T=39)

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<sup>1</sup> The goals are listed in order of priority based on the total (T) combined Importance (I) and Urgency (U) rating scores given by the planning team members.

## Major Functions

These major functions are the principal operational tasks CHSM must perform in order to effectively pursue its mission.

1. Accessioning, preserving, curating and displaying historical materials for public enjoyment and access for legitimate research purposes.
2. Securing and maintaining secure and environmentally sound facilities for storage, processing, display and research related to its collection of historic documents, photographs and other materials.
3. Developing and providing a variety of programs and events for the public and local school students that feature Clarkdale's history.
4. Recording and preserving oral histories of past and current Clarkdale residents.
5. Sponsoring and supporting efforts to preserve Clarkdale's historic commercial buildings and houses.
6. Acquiring adequate funding to meet the operational needs and achieve the goals of the organization.
7. Recruiting, training and maintaining a staff of qualified volunteers who meet the service needs of the organization.
8. Maintaining ongoing quality internal and external communications and relationships with defined stakeholder groups.
9. Securing the necessary professional expertise to help ensure the organization maintains high operational standards and continues its growth and development.
10. Establishing and maintaining a strong, collaborative and supportive relationship with the Town of Clarkdale.

## Critical Success Factors

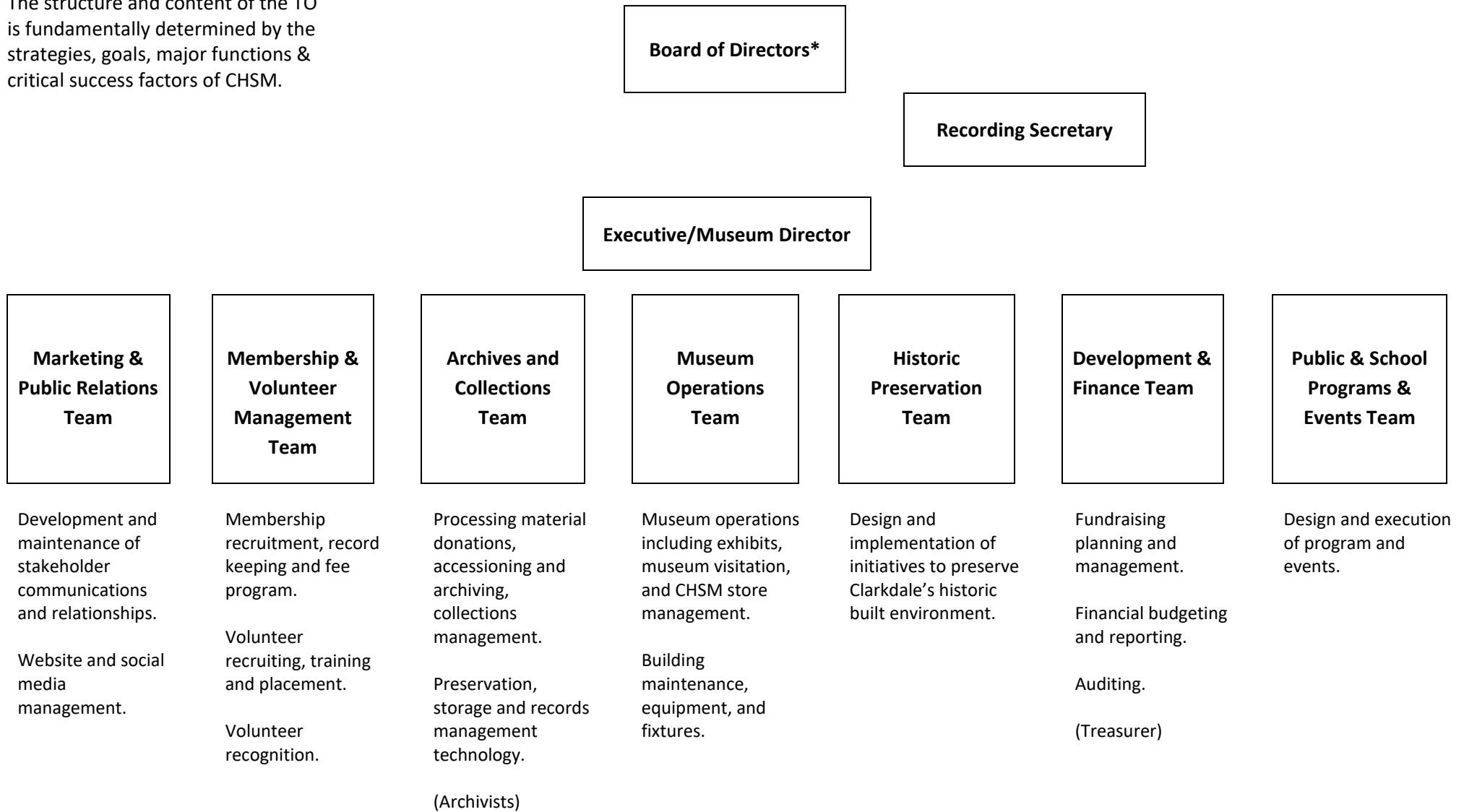
These factors are the critical organizational elements CHSM must develop and maintain in order to maximize its chances of becoming a truly successful organization.

1. A well-developed and integrated strategic plan that is continuously used to guide policy, management and operational decisions, and is periodically reviewed and updated.
2. Annual management and operational action plans based on clearly defined roles, accountabilities and responsibilities.
3. A multi-faceted, realistic funding plan that is pursued as a top priority and meets the financial needs of the organization.
4. Frequent, high-quality internal and external communications to organization members and other identified stakeholders.
5. Ongoing quality communications and relationships with organizations that have similar goals, as well as with potential and existing large donors.
6. Museum physical space and related equipment that adequately supports the mission and goals of the organization.
7. A board of directors, volunteers and staff who are well qualified, trained and committed to pursuing the mission and goals of the organization.
8. A strong positive working relationship with the Town of Clarkdale that supports the Town's community and economic development plans and initiatives.



## Table of Organization

The structure and content of the TO is fundamentally determined by the strategies, goals, major functions & critical success factors of CHSM.



\* President, Immediate Past President, Vice President, Treasurer, Secretary, Team Directors + 2 At-large members (total of 14 authorized members).

<b>Goal 1. Significantly increase the number of trained staff available to assist CHSM in achieving its mission. (I=38, U=37, T=75)</b>																						
<b>Action Plan</b>		<b>Primary Accountability</b>	<b>2019</b>				<b>2020</b>				<b>2021</b>				<b>2022</b>				<b>2023</b>			
			<b>Quarter</b>				<b>Quarter</b>				<b>Quarter</b>				<b>Quarter</b>				<b>Quarter</b>			
			<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
1.1	Identify qualified and committed candidates from diverse backgrounds to serve on Board of Directors.	Membership & Volunteer Management																				
1.2	Develop and implement orientation and training program for board members and other volunteers.	Membership & Volunteer Management																				
1.3	Achieve fully staffed board of directors.	Board of Directors																				
1.4	Develop operational plan to recruit, deploy, and motivate volunteer staff in sufficient number to achieve full staffing.	Membership & Volunteer Management																				
1.5	Achieve volunteer staffing level.	Membership & Volunteer Management																				

<b>Goal 2. Secure the funding necessary to meet the short- and long-term needs and goals of the organization. (I=35, U=36, T=71)</b>																						
<b>Action Plan</b>		<b>Primary Accountability</b>	<b>2019</b>				<b>2020</b>				<b>2021</b>				<b>2022</b>				<b>2023</b>			
			<b>Quarter</b>				<b>Quarter</b>				<b>Quarter</b>				<b>Quarter</b>				<b>Quarter</b>			
			<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
2.1	Establish finance and fund raising structure comprised of board members and qualified volunteers.	Board of Directors																				
2.2	Develop a comprehensive funding program with incremental annual goals to reach and exceed targets below.	Development & Finance																				
2.3	Establish 5-year budget to cover short - and long-term operating and capital expenditures and fund raising goals.	Development & Finance																				
2.4	Raise \$15,000 + annually through combination of individual and corporate memberships.	Membership & Volunteer Management																				
2.5	Raise \$10,000 + annually through book sales, other souvenir sales, and subscriptions.	Museum Operations																				
2.6	Raise \$10,000 + annually through combination of special event admission and event sponsorships.	Programs & Events																				
2.7	Raise \$10,000 + annually through planned giving, memorials, and bequests.	Development & Finance																				
2.8	Raise \$10,000 + annually through grants.	Development & Finance																				
2.9	Develop plan for other income opportunities (example rental income upon potential acquisition of new building).	Development & Finance																				

<b>Goal 3. Continue, optimize, add and upgrade museum exhibits, programs and operations. (I=36, U=32, T=68)</b>																							
<b>Action Plan</b>		<b>Primary Accountability</b>	<b>2019</b>				<b>2020</b>				<b>2021</b>				<b>2022</b>				<b>2023</b>				
			<b>Quarter</b>				<b>Quarter</b>				<b>Quarter</b>				<b>Quarter</b>				<b>Quarter</b>				
			<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	
3.1	Develop museum exhibits... (interactive, oral histories, frequent CMCH tours, accessibility of collections).	Museum Operations																					
3.2	Develop, upgrade, and continue public programs that celebrate Clarkdale's history.	Museum Operations																					
3.3	Enhance & improve operations through cooperative agreements / internships, e.g., Mingus Union High School, Yavapai College.	Museum Operations																					
3.4	Enhance visibility, accessibility, and curb appeal of museum.	Museum Operations																					
3.5	Acquire use of reading room in Clark Memorial Clubhouse for defined purposes.	Museum Operations																					
3.6	Maximize number of programs / events offered in Clark Memorial Clubhouse.	Museum Operations																					

<b>Goal 4. Formulate and implement marketing strategies that strengthen public and potential large donor knowledge and appreciation of Clarkdale’s history and CHMS’s role in preserving and celebrating that history. (I=30, U=29, T=59)</b>																						
<b>Action Plan</b>		<b>Primary Accountability</b>	<b>2019</b>				<b>2020</b>				<b>2021</b>				<b>2022</b>				<b>2023</b>			
			<b>Quarter</b>				<b>Quarter</b>				<b>Quarter</b>				<b>Quarter</b>				<b>Quarter</b>			
			<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
4.1	Build a strong marketing committee to design and implement a multi-faceted marketing plan.	Marketing & Public Relations																				
4.2	Seek designation and funding as the Town of Clarkdale's official history museum.	Marketing & Public Relations																				
4.3	Continue membership, support, and collaboration with Clarkdale Downtown Business Alliance.	Board of Directors																				

**Goal 5. Substantially enhance and accelerate work to inventory and digitize, as appropriate, documents and other historic assets owned by CHSM or for which it assumes responsibility. (I=29, U=29, T=58)**

Action Plan		Primary Accountability	2019				2020				2021				2022				2023			
			Quarter				Quarter				Quarter				Quarter				Quarter			
			1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
5.1	Establish and maintain strong collaborative and supporting relationship with Town of Clarkdale.	Museum Operations																				
5.2	Further develop and accelerate accessioning program.	Museum Operations																				

<b>Goal 6. Stabilize and professionalize the operation of CHSM. (I=26, U=25, T=51)</b>																						
<b>Action Plan</b>		<b>Primary Accountability</b>	<b>2019</b>				<b>2020</b>				<b>2021</b>				<b>2022</b>				<b>2023</b>			
			<b>Quarter</b>				<b>Quarter</b>				<b>Quarter</b>				<b>Quarter</b>				<b>Quarter</b>			
			<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
6.1	Engage a qualified volunteer professional coordinator / Hire a part- or full-time professional museum director.	Board of Directors																				
6.2	Maintain a sufficient number of qualified staff archivists.	Museum Operations																				
6.3	Maintain CHSM's 501(c) 3 status.	Development & Finance																				
6.4	Retain a part- or full- time professional grant writer.	Board of Directors																				
6.5	Measure the public's perception of the organization and its performance.	Board of Directors																				

**Goal 7. Develop and implement a program that supports the preservation and renovation of Clarkdale’s historic built environment, including development and submission of applications to the National Register of Historic Places. (I=26, U=23, T=49)**

Action Plan		Primary Accountability	2019				2020				2021				2022				2023			
			Quarter				Quarter				Quarter				Quarter				Quarter			
			1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
7.1	Establish and staff CHSM's Historic Preservation Team.	Board of Directors																				
7.2	Acquire needed resources to review and update current historic resource survey.	Historic Preservation																				
7.3	Identify, designate and publicize Clarkdale's most endangered historic resources.	Historic Preservation																				
7.4	Evaluate partnering with appropriate entities (E.g., building owners/occupants, Clarkdale Downtown Business Alliance) to preserve downtown buildings.	Historic Preservation																				
7.5	Formulate and advocate for an historic preservation ordinance.	Historic Preservation																				
7.6	Engage local, county, state and federal officials to support the preservation of Clarkdale's history.	Historic Preservation																				



Action Plan		Primary Accountability	2019				2020				2021				2022				2023			
			Quarter				Quarter				Quarter				Quarter				Quarter			
			1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
8.1	Document five-year facility space and equipment requirements for office, archives, working/staging / display, and event space.	Museum Operations																				
8.2	Identify potential sites / buildings for office, archives, working/staging / display, and event space.	Museum Operations																				
8.3	Acquire adequate new building at lowest reasonable cost.	Board of Directors																				