

# **Report to the National Endowment for the Humanities**

## **Arizona Humanities Site Review**

**February 9-10, 2017**

This report is prepared by Marc Johnson and Robert Young as part of the NEH's self-assessment process for state humanities councils. We were selected as outside consultants to participate in the Arizona humanities council's assessment process because of our experience both as humanities professionals and former directors or board members of state humanities councils and for our work at the national level as leaders of other humanities organizations. We were joined in our endeavor by Karen Mittelman, the director of NEH's Division of Public Programs.

A major part of our work involved a two-day site visit to the Arizona humanities council at its central office in Phoenix, Arizona, on February 9-10, 2017. Our job during the site review was to study the council's written self-assessment report and to observe the council's work within the context of its position in the cultural and educational landscape of Arizona. To this end, we observed the council's staff and its board of governors, and we met with a broad spectrum of people with whom the council works and with whom the council forms partnerships to engage Arizonans in the work and the rewards of the public humanities.

Our report is organized into three main sections that best serve to describe the council and its work: the context within which the council operates, the council and its contributions to the public humanities in Arizona, and the council's organizational effectiveness and management. Finally, we will conclude our report with suggestions for the council to consider as it looks to the future.

### **The Context within which the Arizona Council Operates**

During the past five years, the council has undergone significant changes and has undertaken major initiatives. While the state of Arizona has yet to fully recover from the recession of 2008, its economy is currently continuing to expand at a favorable rate. Nevertheless, the state's investment in and support of public education has been poor, and in 2015 Arizona ranked last in public school per pupil spending. Also, the past five years have witnessed a decline in state support of afterschool programs as well as a reduction of public educational programs in state libraries and museums. Such cuts in educational and cultural programs have not only adversely affected the state's population in general, but they have had a particularly dire effect on students of color and on Arizona's large Latino population: Latinos represent 30 per cent of Arizona's

population, and 38 per cent of Arizona's Latino children live in poverty. On a more positive note, the Arizona council operates within a large and diverse nonprofit environment. Arts, cultural and humanities nonprofit organizations represent almost 8% of the more than 21,000 registered nonprofit organizations in the state.

In order to meet the economic challenges facing educational and cultural organizations in the state and in order to take advantage of the vibrant nonprofit sector in which it operates, the council embarked on a successful effort to ensure its long term sustainability and to rebrand its image and heighten its visibility in Arizona. In addition to establishing an endowment fund in 2011, the council parlayed its physical location in the heart of downtown Phoenix into an attractive and accessible central office. By working closely with the city of Phoenix, the council was able to renovate the historic Ellis Shackelford House into a safe and productive workspace for the council's staff and a welcoming arena for public programs and business meetings. This extraordinary effort has increased the visibility of the council and has provided it with a strong presence, both physically and symbolically, within a growing downtown cultural corridor.

Statewide, the council's efforts at rebranding have been impressive. The council renamed itself, changing from Arizona Humanities Council to "Arizona Humanities" or "AZHumanities" and introducing an updated, media-friendly logo. This effort, along with the introduction of impressive new marketing materials that reflect the diversity of the council's program offerings, was successfully coordinated with a major redesign of the council's website.

The new website ([www.azhumanities.org](http://www.azhumanities.org)) is simply first-rate. It is maintained and updated in real time and in-house by a talented and tech-savvy staff, and it allows all Arizonans 24-hour access to council news, programs, and resources. The website's events calendar, for example, is particularly impressive as a showcase for the significant number of humanities programs offered statewide. Additionally, grantees from all parts of the state can submit online grant applications, and they receive rapid and coordinated feedback from the council's program staff.

The council has also expanded its social media presence with an e-newsletter and active Facebook, Twitter, and Instagram accounts, all of which have enabled it to reach a wider audience and to generate more interest in the humanities in Arizona. As well, the print materials of Arizona Humanities are attractive, compelling and effective.

In sum, the council has done a brilliant job in the past five years as it has navigated between the challenges of decreased funding for statewide educational and cultural programs and the opportunities presented by a re-vitalized and energetic nonprofit environment. The organization's strategic plan, developed in 2010, has served Arizona Humanities well, guiding its efforts to build a solid infrastructure by renovating its historic

offices, remaking its image, enhancing the use of technology, and bolstering its presence throughout the state. This council is highly attuned to the context in which it operates, and it has shown agility and imagination in placing itself in a strong position to move forward.

### **The Council's Contributions to the Humanities**

The well-established flagship programs of the council continue to be the bedrock of its humanities programming: AZ Speaks and the Grants Program. AZ Speaks is fundamentally important to the council's efforts to provide solid humanities programming to almost every community in the state, providing affordable humanities speakers to libraries, local nonprofits, K-12 schools, rural communities, and a wide range of educational institutions. Its outreach is impressive: over 200 humanities presentations in 2016. The Arizona State Library is a valuable and effective partner in helping the council deliver AZ Speaks programs to public libraries throughout the state. Since 2015 it has been possible for host organizations to both book and manage speakers and programs online. This is a popular program and an important one. As one librarian from the city of Maricopa Public Library exclaimed, "Without AZ Speaks we wouldn't have any programs!"

The second major pillar of the council's programming is its Grants Program that enables the council to elicit humanities programs from grass-roots organizations throughout the state and to help local communities create educational programs of their own design. This program has been improved with the redesign of the council's website and the addition of an online grants management program.

While the number and the diversity of the humanities programs funded through the Grants Program remain impressive, the importance of the council's mini-grants cannot be overstated. These small grants of about \$1,000 provide opportunities for small organizations with limited budgets to sponsor their own programs and to leverage funds to partner with other civic and cultural organizations at the local level. The comments of grantees speak for themselves:

*"We have nothing but good to say about the impact of even a modest grant on our programs." – comment from a group that has created a popular annual festival exploring and celebrating Arizona's diverse cultural heritage.*

*"Everything we have accomplished has been made possible by the Arizona humanities council." – comment from a small community historical preservation group.*

*"They provided critical funding to allow us to launch a community program." – sponsor of a local program featuring Arizona speakers and encouraging community engagement.*

The council's grant program speaks to the heart of its mission, allowing individual voices to be heard and encouraging local communities to tell their stories. The council's stewardship and administration of its grant program is solid, and its outreach to local organizations is impressive.

To complement AZ Speaks and the Grants Program, the council has recently streamlined and expanded its partnerships with other state-wide organizations, such as the Arizona Women's Hall of Fame, the Arizona State Library and Archives, the Tucson Chinese Cultural Center, and Arizona State University, to directly engage community members in civil dialogue about vital current issues and to foster rich relationships with a variety of ethnic and previously underserved groups with the state.

FRANK Talks, a program launched last summer in partnership with the Arizona State Library and Archives to provide thoughtful, scholar-facilitated discussions in public libraries, is already emerging as one of the council's most popular programs. The council has also been remarkably successful in extending its NEH grants into effective programs for and partnerships with veterans' groups, the Latino community, youth and literacy programs, and a broad spectrum of civic organizations to host conversations on race, immigration and borders, prisons, and refugee resettlement. In this regard, the council is to be commended for its thoughtful and vigorous approach to the opportunities the humanities provide for building stronger communities in the state.

It is our view that in the past five years Arizona Humanities has struck a healthy balance between creating imaginative and timely council-conducted programs and using its grants program to elicit grass-roots humanities initiatives from communities throughout the state which allow even the smallest voices to be heard and to add their threads to the rich cultural fabric of Arizona. In this regard, the staff of Arizona Humanities deserves special mention. Effective programs require effective staff to conceive and implement. The staff is cohesive, committed, engaged and effective. Virtually every person we spoke with over our two day visit singled out one or another individual staff member for their level of professionalism and engagement. We are particularly impressed with the level of collaboration between the staff and its many partners across Arizona.

### **The Council's Organizational Effectiveness and Management**

The council has done an exceptional job of reorienting and strengthening its organizational effectiveness during the past five years. Such work has not been easy, and both the council's staff and board should be commended for such a noteworthy accomplishment.

Beginning in 2014, when it embarked on an impressive rebranding effort, the council has worked to realign its staff and board to reflect the realities of its post-recession

environment and to confront development challenges by increasing visibility. It has now emerged from a time-consuming search for new office space with a well-equipped and visually aesthetic central office, which allows the staff to work in a clean, safe, and comfortable environment. The council has also moved to tailor the board's membership to fit the new goals of the organization. While the board retains a healthy geographic, scholarly, and ethnic mix, it has also added members who have the potential to identify persons and organizations in the state that can support the developmental work of the council. Additionally, the board is increasingly committed to raising the visibility of the council and engaging in fundraising for the council.

Much of the credit for strengthening and transforming the organizational structure of the council belongs to its talented and capable Executive Director. Over the past five years, she has assembled an energetic staff of experienced professionals who blend effectively with the council's administrative and programmatic needs. Perhaps more importantly, the director's background in management, human resources, and fundraising portends continued staff stability and a strong and resilient organizational structure for the council.

The Executive Director's effectiveness has been enhanced by the work of an engaged and capable Executive Committee. The director/board relationship, which in some cases can be a troublesome one, is in this instance healthy and mutually beneficial. Finally, the council has been on a solid fiscal foundation for the past five years, having just completed five successful audits. It is now enjoying key board members with extensive financial management experience. In sum, Arizona Humanities is a healthy organization, and it is well positioned to move into a promising and rewarding future.

### **Observations and Recommendations**

As noted, the organization has effectively addressed several issues that were important in the last self evaluation. With acknowledgement of the obvious (and likely continuing) level of uncertainty about funding for the NEH and its related support for state councils, Arizona is in solid financial shape and is well positioned for the future.

We applaud the progress of the last several years and respectfully suggest that the focus forward must be on defining the aspirations of Arizona Humanities over the next five years. Our specific recommendations relate to those considerations.

1. Strategic planning. The board and staff of Arizona Humanities will soon begin a strategic planning process that is essential to creating a mechanism to more fully consider and address important planning issues.
  - a. We respectfully suggest that the entire staff of Arizona Humanities be involved with the board in this process in order to ensure the widest possible consideration of issues and to generate both enthusiasm and

ownership of whatever strategy is adopted. Full staff engagement will also increase the likelihood that the staff has the time and resources to fully implement any new plan.

2. Financial Development. Diversification of financial support for the council, including the eventual ability to maintain a robust program less reliant on NEH support, is a stated objective of the board and executive director. While we applaud the objective, it will require an enormous effort to accomplish.
  - a. The full engagement of the board will be essential if these financial objectives are to be attained.
  - b. We respectfully recommend a stronger commitment by all board members to the financial support of the organization.
  - c. A new strategic plan might well envision a more robust role for individual board members in identifying and cultivating potential financial supporters of Arizona Humanities.
  - d. Consideration should be given to the question of whether the organization needs to eventually employ a full-time development director or, as an alternative, realign existing staff responsibilities in order to provide greater development support to the executive director. It is hard to imagine a successful strategy to grow an endowment and eventually establish a far greater degree of financial independence that does not include more personnel resources dedicated to development.
  - e. The council's established and growing endowment represents both an opportunity and a challenge. We suggest that a principle focus of the new strategic plan should address how best to grow the endowment over the next five years. We would observe that creating and growing an endowment that is broadly dedicated to ongoing operations could present a difficult marketing challenge. Donors may be reluctant to contribute to an endowment that seems to be dedicated to doing what the organization is already currently doing as opposed to ensuring ongoing support for a specific identifiable program or initiative. The board might consider a strategy that would dedicate the endowment to sustainable funding of one or more particularly important council programs or initiatives. For example, if the endowment were dedicated to perpetuating the council's speakers programs or some other "signature" effort, the marketing of an appeal for support might be sharpened and more clearly defined for prospective donors.
3. Board recruitment. We were impressed by the level of engagement as well as the diversity of the board members we met. Constantly identifying, cultivating and recruiting new board members, particularly those with an ability to assist the

organization's development objectives, seems to be an essential ingredient for future success. We recommend a renewed focus on board recruitment. One strategy may be for each board member to develop a personal list of five or more potential candidates that they believe could be a strong candidate to replace them on the board.

## **Summary**

Arizona Humanities is an impressive and effective organization with a highly professional and collaborative staff. Programs are well conceived and competently administered. Arizona Humanities has made significant progress in defining its public image and enjoys many solid partnerships with libraries, universities and cultural organizations across the state.

In our judgment the principle challenges facing the organization involve the development and implementation of a new strategic plan that holds the promise of carrying Arizona Humanities to an even higher level of recognition and achievement, while furthering the goal of greater financial strength and independence. As with most nonprofits, even those blessed with a highly capable staff, the key to reaching new levels will largely depend on the board and its vision, engagement, and commitment.

We wish them well.