



# Heritage Square Foundation 2024-2028 Strategic Plan

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# Executive Summary

Heritage Square Foundation has operated in partnership with the City of Phoenix since 1980 to preserve the buildings, stories, and history of the oldest remaining residential block of the original townsite of Phoenix. The buildings on the Square date back to the late 1800s including the 1895 Rosson House Museum, though this site's human history began much earlier with the Ancestral Sonoran Desert People who were the first to live here.

Saved from demolition in the early 1970's through a community effort, Heritage Square provides a place where the past and present ignite imagination for a promising future, serving as a relevant, engaging, and inclusive community resource and providing a tangible connection to our diverse local history. Through tours, programs, events, and other memorable experiences, Heritage Square, a designated Phoenix Point of Pride, is a fun and engaging destination in the heart of Phoenix for all.

The strategic plan has several **key goals**:

- Preserve and protect the historic buildings and museum collections at Heritage Square.
- Enhance the programs and offerings to provide a diverse and inclusive experience.
- Engage with the community and strengthen connections with volunteers, staff, partners, and other constituents.
- Foster sustainability and adaptability to ensure continued relevance and success.

To achieve these goals, Heritage Square Foundation will implement the following **strategies and initiatives** that reflect adaptability, intentionality, and its unique character:

- *Historic Preservation*: The Foundation will invest in the restoration and preservation of Heritage Square's historic buildings and museum collections.
- *Diverse Programming*: Staff will develop a wide range of inclusive programs and events that resonate with the community.
- *Community Engagement*: The Foundation aims to foster meaningful collaborations with volunteers, Foundation staff, City staff, partners, like-minded organizations, and other constituents.

- *Sustainability and Innovation*: Embracing change and innovation is a key strategy to remain relevant, adaptable, and sustainable.

The strategic plan aligns with the Foundation's **core values**:

- *People First*: The Foundation prioritizes inclusivity and engagement, valuing every member of the diverse community.
- *Be Weird*: Celebrate individuality and creativity, reflecting Heritage Square's unique character.
- *Leadership*: The Foundation aims to be a voice for the community, guiding it through historical exploration.
- *Adaptability*: Active embrace of change is essential to ensure continued relevance.
- *Be Intentional*: Transparency and trust are essential elements in the strategy.

**Conclusion:** This strategic plan is more than a roadmap; it's a transformative journey. It holds the potential to preserve history, embrace diversity, and enrich lives. As Heritage Square Foundation embarks on this path, it recognizes that its goal to harness the power of shared experiences is not just a vision; it's a commitment to Phoenix's diverse history and to the vibrant community it serves. Together, the people of Heritage Square Foundation will continue to build bridges between the past and the future, ensuring that life blossoms at Heritage Square.

## History of the Foundation

Heritage Square Foundation has a rich history that serves as the basis for its current role as a dynamic and vital institution in downtown Phoenix. Below is an overview of its history and present-day role.

### Historical Context

Heritage Square was founded as a tribute to Phoenix's rich history. Its historical significance is deeply rooted in the development of downtown Phoenix.

The region where Phoenix stands today has a long history of Native American occupation, primarily by the Ancestral Sonoran Desert people. They established an extensive network of irrigation canals, which allowed for agricultural development in the desert. In the second half of the nineteenth century, white settlers took advantage of the canal system to develop agriculture and establish the town site of Phoenix. For this reason, the Foundation publicizes a statement, written by the City

in consultation with local Tribal leaders, to acknowledge the history of the land that Heritage Square now occupies.

The growth of Phoenix included the contributions of Black, Mexican, Chinese, and Japanese immigrants, as well as Native American communities. Despite the challenges of discrimination, outlying Phoenix neighborhoods were often culturally mixed. However, segregation caused the marginalization of these communities, and their contributions to history have largely been erased. It's in the best interest of the descendants of these communities and of Heritage Square to find ways to highlight their stories.

The history of the Heritage Square Foundation is deeply entwined with the history of Heritage Square itself. Heritage Square, located in downtown Phoenix, is a historic district that boasts a collection of beautifully restored late 19th and early 20th-century homes. These homes were once the residences of prominent individuals in the Phoenix community, and they reflect the architectural and cultural heritage of the area.

In the late 20th century, as many historic buildings faced the risk of demolition or neglect, a group of dedicated individuals recognized the need to preserve this site. The City of Phoenix purchased the property, and the idea was born to create a nonprofit organization that would work in partnership with the City to safeguard these historic properties and make them accessible to the public. This vision led to the establishment of the Heritage Square Foundation, which has been operating under a series of agreements with the City since 1980. The current Master Use Agreement between the Foundation and the City was established in 1987 and has been amended several times. Over the years, the roles of each party in managing Heritage Square have evolved, and requires updating our current Master Use Agreement to recognize current strategies.

## Heritage Square Foundation's Role Today

Today, Heritage Square Foundation plays a pivotal role in preserving and sharing the history of Heritage Square and the greater Phoenix area. To serve as a relevant, engaging, and inclusive community resource, connecting people to the diverse local history, here's how the Foundation fulfills this mission today:

- **Preservation:** The Foundation is actively involved in the preservation and maintenance of the historic buildings and museum collections at Heritage Square. This ensures that the architectural and cultural heritage of the area is safeguarded for future generations.

- **Programming:** Heritage Square is not just a collection of historic buildings; it's a vibrant hub for cultural and community events. The Foundation offers diverse programming and events that cater to the interests and needs of the local community. These programs include educational workshops, cultural events, and activities that engage visitors of all ages.
- **Community Engagement:** Heritage Square Foundation has fostered meaningful collaborations with volunteers, Foundation staff, City staff, business and nonprofit partners, and various other constituents. This collaborative approach ensures that the Foundation remains connected to the community it serves.
- **Sustainability and Adaptability:** The Foundation recognizes the importance of adaptability in the face of changing times. It actively embraces change and innovation to stay relevant, ensuring the continued success and sustainability of Heritage Square.
- **Promotion of its Enterprises:** The Foundation actively promotes the Rosson House Museum, facility rentals for short-term events, museum store, and restaurant tenants. Each of these enterprises, including tenants Pizzeria Bianco, Latha, Que Sazon, and Stemistry, contribute to the vibrancy and diversity of Heritage Square and provide unique dining, shopping, and cultural experiences.

In summary, Heritage Square Foundation is deeply rooted in the preservation of Phoenix's historical, cultural, and architectural heritage. Today, it continues to evolve, ensuring that Heritage Square remains an authentic and engaging destination that connects with the diverse community, enriches lives, and serves as a tangible link to the area's history. The Foundation's commitment to inclusivity, community engagement, and adaptability reflects its dedication to promoting the cultural and historical legacy of Phoenix.

### **[Master Use Agreement and Amendments](#)**

# Mission, Vision, & Values

## Mission

Heritage Square Foundation is dedicated to preserving and sharing the stories, collection, historic buildings and grounds of Heritage Square, serving as a relevant, engaging, and inclusive community resource and as a tangible connection to our diverse local history.

## Vision

The people of Heritage Square Foundation have a vision to harness the power of shared personal and community experiences to enrich and transform lives. Heritage Square is:

- Authentic. At Heritage Square, everyone is welcome to admire the original historic buildings inside and out, learn about Phoenix history and lifeways, walk your dog, enjoy a meal, share a cup of joe, exchange vows, and literally smell the roses. Life blossoms at Heritage Square.
- A destination in the heart of Phoenix that represents not only the origins and history of Phoenix but also the ongoing development of our City, always reimagining our identity to connect with the people of Phoenix and remain relevant to our community's needs and expectations.
- A collaboration of volunteers, Foundation staff, City staff, business and nonprofit partners, and other stakeholders that actively seeks to build each other up and to understand and serve the diversity of people that makes up our audience of Phoenicians, Arizonans, and appreciated visitors.

## Values

- *People First* - Valuing everyone with compassion and respect
- *Be Weird* - Embracing individuality (& diverse perspectives)
- *Leadership* - Being a voice for our community
- *Adaptability* - Welcoming change
- *Be Intentional* - Earning trust through transparency

# Strategic Plan Development

Heritage Square Foundation's process for developing this strategic plan involved several key steps as listed chronologically below.

- 1) *Assessment and Research*: The Foundation began by conducting a thorough assessment of its current state. This included evaluating its historical context, understanding the needs and expectations of the community, and examining its existing programs and initiatives.
- 2) *Mission and Vision Refinement*: The Foundation revisited its mission and vision statements, ensuring they reflected its commitment to inclusivity and community engagement. This process helped clarify the Foundation's core purpose and long-term goals.
- 3) *Values Workshop*: The Foundation conducted an all-staff workshop with the objective to develop a set of organizational values for the Heritage Square Foundation, understanding their importance and aligning the team's perspectives. The workshop began with an overview of the purpose, an explanation of the importance of organizational values, and an overview of the agenda and expected outcomes. Over the following hours, staff engaged in a series of exercises to understand personal and organizational values, identify the organization's current values, assess and prioritize values, and refine, define, and finalize the core values of the Foundation.
- 4) *Organizational Purpose Workshop*: The Foundation held an all-staff workshop focused on crafting the organizational purpose guiding all strategies, programs, and actions. Commencing with a review of the newly established values from the previous session, the workshop delved into evocative stories about the Square, sparking discussions and brainstorming sessions. These aimed to identify the ideals crucial for serving our community and fulfilling our mission. Through various exercises, staff explored their individual 'whys,' consolidating the most pertinent elements into a cohesive, driving purpose for future endeavors. This culminated in the identification of action plans and initiatives as the workshop drew to a close.
- 5) *Draft Strategic Plan*: At the request of the board, a draft plan was written by Executive Director Kari Carlisle and Deputy Director Ashley Davis to serve as a starting point for further development. The draft was written to ensure that it aligned with the Foundation's mission, vision, values, and purpose.
  - a) *SWOT Analysis and KPIs*: To begin the process of identifying strategies, an initial SWOT analysis (strengths, weaknesses, opportunities, and

threats of the organization) and identification of KPIs (key performance indicators) were developed.

- b) Strategy Identification: High-level strategies were identified to guide the overall strategic plan.
  - c) Goals and Objectives: Specific goals and objectives were developed that would help achieve the identified strategies.
- 6) *Strategic Plan Steering Committee*: The Committee was established and consisted of Kevin Lozier (Board President), Jerry Cook (Board Vice President), Kari Carlisle (Executive Director), and Ashley Davis (Deputy Director). The committee met over several hours to review the draft, identify revisions, and establish the timeline and implementation of the plan.
  - 7) *Second Draft*: Based on committee recommendations, the plan was revised and edited. The committee completed an additional review and draft and established next steps for submitting the plan for constituent review.
  - 8) *\*Constituent Engagement*: To ensure inclusivity and community involvement, the foundation engaged with various stakeholders, including volunteers, staff, City staff, business and nonprofit partners, and the local community. Their input and feedback were essential in finalizing the plan and identifying potential tactics for achieving its goals and objectives.
  - 9) *\*Conclusion and Communication*: The strategic plan was finalized with minor revisions and concluded with a powerful statement emphasizing its transformative potential and its role in enriching lives and connecting with the diverse history of the community. The final draft was presented to and approved by the board.

*\*Note: The final two activities in the development of this strategic plan are still underway.*

Overall, Heritage Square Foundation's Strategic Plan was developed through a comprehensive and inclusive process, with a strong focus on inclusivity, community engagement, and the preservation of Phoenix's historical heritage.

# Strategic Plan

## I. City Relations

In their ongoing efforts to enhance relationships with the City and realize their shared vision for Heritage Square, Heritage Square Foundation is committed to strengthening communication and joint operations. This cooperative approach is guided by the following goals and objectives:

### Goals and Objectives

- 1) Develop engagement with City leaders:
  - a) Identify key individuals within the City, including legal counsel, who can serve as advocates and allies for the Foundation's mission.
  - b) Determine the levels of engagement between the Foundation and City leaders and staff.
  - c) Create an ongoing document with talking points that highlight the value of the Foundation, issues and problems, and specific requests and demands.
- 2) Partner with the City for repairs, maintenance, and historic renovation/preservation funding:
  - a) Clarify roles and responsibilities in partnership with the City, and determine needs and priorities.
  - b) Explore various funding sources, including grants, City budget allocations, and general obligation bond funding.
  - c) Ensure physical accessibility and maintain all buildings in sustainable, working order.
- 3) Develop a mutually beneficial operations plan and new Master Use Agreement:
  - a) Clarify roles and responsibilities in the management of all operations and facilities.
  - b) Explore the ways that Foundation and City-run events can be managed to the benefit of all constituents, and clarify the Foundation's authority and the City's role.
  - c) Ensure that the Foundation's mission, vision, values, and purpose are fully represented throughout the development of the new documents.

## II. Public Relations

Heritage Square Foundation is dedicated to ensuring that the entire community always feels welcome and included at Heritage Square. In pursuit of this goal, the

Foundation is focused on strengthening relationships through community outreach and establishing supportive connections with leaders and organizations from marginalized communities. The Foundation also expands its advocacy partnership efforts to encompass education, climate solutions, and accessibility.

## Goals and Objectives

- 1) Develop and manage an advocacy plan:
  - a) Advocate for support and funding for the Foundation's core programming, emphasizing historic preservation, sustainability, teaching inclusive history, arts, and science.
  - b) Advocate for support for other organizations, with a focus on developing relationships with leaders to impact the community through advocacy efforts.
  - c) Develop relationships with community leaders and elected officials, and educate them on the benefits the Foundation brings to the community as well as the Foundation's needs.
- 2) Establish and strengthen partnerships and collaborations:
  - a) Provide support to Indigenous communities directly and indirectly impacted by Heritage Square.
  - b) Extend support to Black and African American communities that were displaced or subjugated by historical forces in Phoenix, actively engaging to strengthen their communities today.
  - c) Partner with like-minded organizations to support the history and culture of marginalized communities.

## III. Operations

Heritage Square Foundation maintains a strong commitment to the empowerment and development of its employees, board, and volunteers, recognizing their invaluable contributions to overall success. The Foundation places great emphasis on including employees in business planning, with a particular focus on Diversity, Equity, and Inclusion (DEI), accessibility, and recruitment and retention strategies. Stabilizing financial health is a critical area of focus for the organization, achieved through effective and efficient procedures, responsible expenditure practices, and a well-considered investment policy. The Foundation also actively plans for business growth by optimizing the use of its facilities, developing procedural plans, and exploring new revenue streams.

## Goals and Objectives

- 1) Implement departmental plans:

- a) Develop coordinated departmental plans that reference each other to prevent siloed work within each department.
- 2) Meet compensation and development needs:
  - a) Increase the organization's capacity to support competitive compensation and benefits to enhance talent retention and promote a balanced work-life.
  - b) Budget for and support training and networking opportunities for staff to enhance their career development.
  - c) Establish regular board development plans.
- 3) Succession Planning:
  - a) Implement succession planning strategies for the board, staff, and vendor relationships.
  - b) Actively recruit new board members from diverse communities.
  - c) Enhance staff recruitment efforts to attract a diverse and skilled workforce.
- 4) Create business plans to ensure the ongoing financial health and sustainability of the organization:
  - a) Develop a Risk Management Plan to identify and mitigate potential risks and challenges.
  - b) Create a comprehensive Retail Business Plan that covers all sales channels and targeted sales efforts.
  - c) Develop business plans for events and visitor services to enhance visitor experiences and revenue generation.

## IV. Visitor Experience

Heritage Square Foundation is actively engaged in the development of a new Interpretive Plan. Informed by comprehensive data and evaluation, community input, and the identification of important themes, the Foundation is planning to implement a broader array of smaller programs and events tailored to specific audiences and themes. In this pursuit, the Foundation prioritizes accessibility, Diversity, Equity, and Inclusion (DEI), tenant success, and the inclusion of all communities in Heritage Square.

### Goals and Objectives

- 1) Develop and sustain an Interpretation Plan to create a transformative experience for guests:
  - a) Identify and define target audiences, catering to both existing and prospective visitors.

- b) Focus on essential themes such as historic preservation and climate adaptation.
  - c) Utilize data and evaluation metrics to measure impact.
  - d) Implement and provide training in the [Visitor Engagement Funnel](#) to enhance the visitor experience.
- 2) Support tenant success:
- a) Foster a mutually beneficial and collaborative relationship with tenants.
  - b) Develop cross-promotion tactics that result in mutual support.
  - c) Advocate for tenants to ensure City policies and events create maximum benefits for tenant success.
- 3) Plan for accountability for DEI & accessibility:
- a) Enhance community engagement by welcoming new communities into Heritage Square through effective communication and collaboration.
  - b) Improve accessibility within the Rosson House and throughout Heritage Square to ensure a more equitable visitor experience.
  - c) Develop a comprehensive accessibility assessment and plan, encompassing physical, digital, and operational aspects. Prioritize initiatives, and budget and fundraise for timely implementation.

## Conclusion

### Timeframe and Implementation

This Strategic Plan is set to be accomplished over five years. To ensure the plan remains effective and adaptable, progress will be reviewed informally on an annual basis and formally reviewed at the three-year mark. This flexibility allows the Foundation to pivot as necessary to adapt to critical changes.

Upon adoption, the plan will be presented to the entire board for discussion and planning on the board's roles and responsibilities for successful implementation. All staff will meet to plan the structure of the first year and determine tactics for achieving the plan's goals, with the first year focusing on organization and planning, while subsequent years center on developing revenue streams, enhancing programming, and increasing contributions.

### Annual Review

Informal annual reviews will coincide with the annual budget planning process and staff will determine goals and tactics for the next year to support the Strategic Plan.

An annual tactics workshop will be held with all staff to create annual goals as a team.

Input from all staff will inform a presentation to the board highlighting the previous year's progress in achieving plan goals, as well as the next year's tactical plans. The board will also reflect on their own success and plans for the next year.

## Three-Year Review

A formal review will be conducted at the conclusion of year three of the Strategic Plan implementation.

1. *Internal Staff Review:* An all-day workshop will be conducted with staff to review the Strategic Plan. They will reflect on the first three years' successes and discuss opportunities and issues for complete implementation of the plan.
2. *Internal Review Report:* Based on the staff workshop, the Executive Director and Deputy Director will determine where each of the goals and objectives lie in their implementation and the opportunities and issues for successful implementation within the final two years of the plan.
3. *Committee Review:* A Strategic Plan Review Committee (Board President, Board VP, Executive Director, and Deputy Director, or replacements as approved by the Board President) will convene to review the Internal Review Report and determine possible recommendations for revising the Strategic Plan. Revision recommendations will be made in the event the plan has been fully implemented within three years, or if insufficient progress has been made so as to cast doubt on the Foundation's ability to achieve all its goals and objectives.
4. *Presentation to Board:* The Strategic Plan Review Committee will present the formal review to the board along with any recommendations for revision. If revisions are recommended, the Board will consider action to approve the revisions.

## Completion

The Strategic Plan is expected to be fully executed by the end of its five-year timeframe. Upon completion, staff, board, volunteers, and other constituents will have an opportunity to reflect and celebrate the success and growth of Heritage Square Foundation. A final report will be created and used as a springboard for the Foundation's next Strategic Plan.