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## MARKET RESEARCH

### I. Methods:

Over the last three months comprehensive research about the Shasta Historical Society has been gathered through surveys and personal interviews from former and current Society board members, development committee members, stakeholders, Shasta County Arts Council members, Turtle Bay members and the general Redding community. The goal of each information gathering effort was to establish clear strengths, weaknesses, opportunities and threats for the organization; analyze present marketing efforts, identify present and potential members, stakeholders and partners. Research was also conducted to evaluate successful marketing efforts of other non-profits to identify potential future marketing opportunities. Members of the community were incentivized to participate in the survey through a prize drawing for a \$50 gift card to Jacks. The following methods were employed to gather research:



1. A 5 question electronic survey sent to board members
2. A 20 question electronic survey sent to stakeholders
3. A 40 question electronic survey distributed to Shasta County Arts Council members, Turtle Bay member, and to Redding community through an article with survey link in the Record Searchlight
4. Individual interviews with former and current Shasta Historical Society board members
5. In person interview with executive director of Shasta Historical Society

A quality sampling of data was gathered through the completion of 250 surveys from the Redding community (including Turtle Bay members, Shasta County Arts Council members and general community members), 18 survey responses from board members and 13 responses from stakeholders. The research gathered a total of 281 responses.

In addition to the above-mentioned research methods Krista Buckel Consulting also gathered information through online research. The following methods were employed to gather research:

1. Review of Shasta Historical Society's assessment report from RWWidera Consulting
2. Review of all current practices, membership models, programming and marketing presently employed by the Society.
3. Researched practices of other thriving historical societies or other similar successful non-profit preservation organizations.



### II. Analysis of Current Marketing

The below section is an analysis of the Shasta Historical Society's current marketing, and is intended to be a comprehensive list of marketing that is already in use. The below description is not a recommendation to keep or continue to use these methods of marketing. My recommendations are included in section X titled "Marketing Strategies" and section XI titled "Recommendations."

1. Stagecoach:  
The Stagecoach seems to be well liked by members. The articles are quality, good listing of upcoming events and meetings.
2. The Covered Wagon:

The Covered wagon seems to be well liked by members, and includes quality historical articles.

3. Historical research:  
Historical research services are an underutilized service of the Historical Society.
4. Shasta Historical Society Annual Calendar:  
The calendar includes outstanding historical photos and a comprehensive list of historical dates.
5. Membership Flyer:  
The membership flyer is a basic word document template.
6. Walking Tour Donation Envelope:  
The envelope seems to fulfill its purpose.
7. Pioneer Plaque Flyer:  
The flyer is a basic flyer.
8. Shasta Historical Society Website:  
The website provides basic information about the Historical Society but lacks mobile optimization, and has a number of unavailable embedded videos. The website is unfortunately quite outdated and does not provide an infrastructure for the Shasta Historical Society to market itself appropriately.
9. Shasta Historical Society Social Media Sites:  
The sites provide minimal updates about the Historical Society.
10. Record Searchlight Monthly Article:  
When utilized the articles seem to generate interest in the Historical Society.
11. Record Searchlight Event Sponsorship:  
Record Searchlight sponsorship provides positive co-branding for the Historical Society.
12. Spring, fall and end of year financial appeal letters:  
Seem to be a good source of obtaining funding.

### III. Present and Potential Audiences and Stakeholders

1. Demographics: The demographics of the audience surveyed about the Shasta Historical Society self reported the following:
  - A. Predominantly White/Caucasian
  - B. Majority are retired
  - C. Majority are aged 55 or older
  - D. Majority of members are married
  - E. Have a high value for local history
2. Current Partners and Stakeholders
  - A. California State Park Foundation
  - B. Old Shasta State Park
  - C. Turtle Bay
  - D. Shasta County Arts Council
  - E. Record Searchlight
  - F. Enjoy Magazine
  - G. A News Café

3. Potential Audiences, Partnerships and Stakeholders

A. Turtle Bay

Seek additional areas of partnership like:

- Dual membership option for Turtle Bay and Shasta Historical Society
- Use Turtle Bay's artifacts for curated exhibits at the Historical Society
- Offer to provide regular tours of the Sundial Bridge through Shasta Historical Society volunteers based on approved tour content.

B. Shasta County Schools

- Creative coordination of field trips about CA history.
- Integrate Shasta Historical Society programming or tours into curriculum.
- Colleges and Universities
- Identify higher education historical clubs and departments to engage.
- Provide internships to students
- Work with professors to integrate Shasta Historical Society programming and tours into curriculum.

C. Corporations

- Create corporate sponsorship opportunities
- Engage businesses in historical video promotion

D. Bureau of Reclamation

- The Bureau showcases the history of a key icon in Shasta County, Shasta Dam. A historical video, free tours, historic photos and models are displayed in the visitor center lobby at the Dam.
- Create a partnership to promote tours, share historical information and collaborate for historical programming.

E. Shasta Lake Heritage and Historical Society

- Collaborate to identify potential areas of partnership. List Shasta Dam Workers Reunion and other historical events on Shasta Historical Societies website.

F. TOSIA: Town of Shasta Interpretive Alliance

- Meet with TOSIA to develop areas of partnership
- List events on Historical Society website

G. Behrens-Eaton House Museum

- Meet with to develop areas of partnership
- List historical events on Historical Society Website

H. Shasta Genealogical Society/Gene

- Meet to discover potential areas of partnership
- List events on Shasta Historical Society website

I. Northern CA Veterans Museum and Heritage Center

- Meet to discover potential areas of partnership
- Develop promotional campaign on history of veterans

J. California Historical Society

- Utilize their web resources that overlap with Shasta County history

K. Lassen Historical Museum

- Meet to discover potential areas of partnership
- List events on Historical Society website

- L. Trinity County Museum
  - Meet to discover potential areas of partnership
  - List events on Historical Society website
- M. Tehama County Genealogical and Historical Society
  - Meet to discover potential areas of partnership
  - List events on Historical Society website
- N. Siskiyou History Alliance
  - Meet to discover potential areas of partnership
  - Partner with historical efforts of preservation

#### IV. SWOT Results and Recommendations based on SWOT Analysis

The below section is a comprehensive list of strengths, weaknesses, opportunities and threats that were identified by the board, surveys, and my observations. These results are not weighted or quantified. A comprehensive breakdown of responses to each survey question is included in the appendix of this report.

##### SWOT Evaluation

###### A. Strengths: See page 11 for addition strengths compared to competition

- Rich repository of history to share about Redding
- Members feel sense of ownership of organization
- Leaders in community
- Dedicated staff, board and volunteers
- Excellent leadership in Executive Director
- Active and vibrant Development Committee
- Focusing on adding value to community
- Good programming



###### B. Weaknesses:

- Limited financial support
- Aging physical facilities with little foot traffic
- Lack of technology
- Aging board members
- No public space large enough for community gatherings and programming.
- Need better relationships with press (Channel 7 Redding)
- Lack of media plan
- Aged membership
- Lack of younger members
- Lack of programming for youth
- Need more enthusiastic, vibrant members
- Lack of upgraded technology in SHS archives and marketing
- Traditional methods of fundraising are falling short
- Lack of budget
- Negative impressions about potential partners like Turtle Bay
- Lack of artifacts owned by SHS (owned now by Turtle Bay)
- Need for additional programming

###### C. Opportunities

- Develop the Shasta Historical Society into a “vibrant center of learning” or distinction to become known as the historical source on issues (Lumber, Water, Mining, Political History, Engineering, Recreation Resource Management)
- Develop innovative historical campaigns (video, print, photo etc)

- Develop relationships with key educational partners (Simpson, Shasta College, Chico State, history clubs, high schools, corporate sponsors: Cal Trans, Turtle Bay, Shasta Wonderland Association, Vestra, Pace, Bureau of Reclamation.
- Becoming an institute
- Become advocate for protection of historical buildings
- Differentiate SHS from other non-profits and other historical organizations
- Grow volunteer base
- Curate historical exhibits
- Grow but keep the main thing the main thing
- Interpretive/educational programs at CA state parks
- Gain new Members
- Increase funding
- Expand presence in community and county
- Develop partnerships

D. Threats: See page 10 for threats related to competition

- Aging and declining membership is only audience that supports SHS
- Lack of strategic plan
- Attracting volunteers and members
- Lack of engagement with members not on board
- Limited funding in Redding to distribute among local non-profits
- Lack of perceived value in community
- Aversion to building a partnership with Turtle Bay due to history of division of artifacts
- Non-progressive board
- Younger participants not participating due to average age of current membership
- Competition: see detailed list under the “Competition” section

## MARKETING PLAN

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### V. Market Research Results

A. Market research demonstrates that a significant portion of the community has never been involved with the Historical Society, and that there is significant interest in being involved with the Historical Society within the next year.



- 59% of community members have never been a member of, volunteered for, and attended an event or program sponsored by the Shasta Historical Society.
- 58% were interested or very interested in becoming involved with the Shasta Historical Society within the next year.

B. The majority of community members identified “not being aware of opportunities” as their reason for not participating with the Historical Society. In order to increase community awareness, attendance at events and as a result gain more members the Historical Society should increase the amount of community advertising.

- 42% identified “not being aware of opportunities” as the primary reason for not being involved with the Shasta Historical Society.
- 38% identified “being too busy”

C. The majority of community members surveyed stated that they were:

- Most interested in becoming involved with the Historical Society by attending events
- Second highest was becoming a member
- Third was volunteering

E. Community advertising should promote opportunities in these three areas of interest: events, membership and volunteer opportunities. As marketing is developed in these areas it is also important to remember that the community is motivated to be involved by an opportunity to invest in the community.

- 50% of community members surveyed were motivated to participate by “investing in organizations that benefit the community”

F. Taking all of this data into consideration the recommended course of action would be to:

- Increase advertising for events
- Increase advertising for membership
- Increase advertising for volunteer opportunities
- All advertising should clearly demonstrate how attending events, becoming a member or volunteering makes a significant investment in the community.

G. Based on market research, community members who have attended events or been involved with the Historical Society were satisfied with their experience. The current programming is successfully engaging the Shasta Historical Society audience.

- Of the 41% who have participated in some way with the Historical Society 94% were satisfied or very satisfied with their experience. Target Market Analysis

### VI. Target Market Analysis

Maintaining the satisfaction, membership and participation of the current market and appealing to and growing new target markets are equally important to the success and growth of the Shasta Historical Society.

A. Shasta Historical Society 's current participants and members can be defined the following:

- Retired
- Married
- 55 or older
- Interest in history
- College graduates



A. The conducted community survey uncovered significant interest in the Shasta Historical Society in additional target markets.

- 25% of community members surveyed identified themselves as being between the ages of 35-54. While this age group is busy with family events and other commitments they still expressed significant interest in being involved. Creating family friendly historical events or programming could be of significant interest to this target market. The majority of this target market is composed of Turtle Bay members. Dual memberships may be the best marketing technique to introduce them to the Historical Society.
- Gaining the attention of this new target market is one thing. Creating satisfaction among the demographic is another thing. It is unlikely that most of the current programming or events would appeal to this target market.
- New programming and events would need to be developed to create satisfaction.

## VII. Service and Membership

### A. Services

#### Board Member Perspectives

Board members selected the following services as most accurately representing the Historical Society's mission: Covered Wagon, Stagecoach and Adult Saturday Programming.



- When the board members were surveyed regarding the same services that promote the Historical Society's vision the top three services selected were:
  1. Covered Wagon
  2. Adult Saturday programming
  3. Staff research services
- When board members were surveyed regarding which services assisted the Historical Society in remaining financially viable the top three were:
  4. Taste of History,
  5. Covered Wagon,
  6. Stagecoach.
- When asked what service or activity could be removed the majority of the board suggested removing the radio minute.
- When asked what service or activity should be added the top suggestions were:
  7. Historical preservation
  8. Interpretive programs
  9. Online archives.

#### Stakeholder Perspective

- When asked to rank services by importance stakeholders selected
  10. Programming
  11. Free historical research
  12. Covered Wagon
- When asked what services stakeholders would add the following were the top suggestions:



13. Youth educational programs
14. Interactive museum
15. New member meet and greet

#### Community Perspective

- When asked which non-profit resources are enjoyed most, top answers included:
  16. Investing in an organization that benefits the community,
  17. Membership and preferred access to special events.
- 60% of the community members surveyed have never been a member of, volunteered with or attended a Historical Society event.
- 57% of community members surveyed are familiar or very familiar with the Historical Society as a non-profit in Redding.
- 62% were interested or very interested in becoming involved with the Historical Society within the next year.
- When asked what capacity community members would be most likely to participate with the Historical Society top responses included:
  1. Attending an event
  2. Becoming a member
  3. Volunteering
- When asked what would be strong motivators for participating with the Historical Society community members selected the top responses:
  1. Personal enjoyment,
  2. Benefiting the local community,
  3. Furthering the mission of the Historical Society.

#### B. Membership

##### Board Member and Stakeholder Perspectives

- When asked what members look for in the Historical Society top responses included
  1. Accurate and informative publications
  2. Historical preservation.
- When asked to describe the demographic of the membership stakeholders primary responses included
  1. Individuals over 55
  2. Those interested in history
  3. Retired individuals

##### Community Perspective

- 62% of community members surveyed were interested in participating with the Historical Society in some capacity in the next year. Many of them were interested in membership.
- 43% of community members mentioned that they would be prevented from participating with the Historical Society because they were “not aware of opportunities”

#### VIII. Competition

The below section is an analysis of the Shasta Historical Society’s competition. I’ve shared the board members perspectives on the organizations competition as well as my evaluation of the organizations competition. As mentioned in the threats section, the competition listed below should be viewed as a threat to the Shasta Historical Society’s continued growth and success.

##### A. Stakeholders and Board Impressions

- When surveyed stakeholders and board members identified the top three competitors as



1. Turtle Bay
  2. Behrens-Eaton House
  3. Shasta County Library.
- When asked what ways the Historical Society is different from its competitors top responses included
    4. Focus on Shasta County history
    5. Housing of artifacts and historical preservation efforts.

Due to the number of donation based, non-profits and the limited income of most Redding households it is imperative that the Shasta Historical Society distinguish itself from it's competitors by adding significant value to the residents of Redding, Shasta County and far northern California.

Competitors for the Shasta Historical Society can broadly be defined as any membership based, non-profit in Redding and Shasta County. By this definition the list of competitors is large and includes, but is not limited to the following:

1. Turtle Bay Exploration Park and Museum
2. Shasta County Arts Council
3. One Safe Place
4. The Women's Fund
5. Haven Humane Society
6. Shasta Living Streets
7. Shasta Regional Community Foundation
8. Northern Valley Catholic Social Services
9. People of Progress
10. Northern CA Veterans Museum and Heritage Center
11. Empire Hotel Alcoholic Rehab Center
12. Shasta Land Trust
13. United Way
14. Good News Rescue Mission
15. Renaissance Redding
16. Faith Works
17. Friends of Shasta County Library

Competition for the Shasta Historical Society can more narrowly be defined as any non-profit, membership-based organizations seeking to promote history and heritage in Redding and Shasta County. By this definition the Shasta Historical Society's competition is the following:

1. Shasta Lake Historical and Heritage Society
2. Bureau of Reclamation
3. Behrens-Eaton House Museum/Trust
4. Shasta Genealogical Society/Ken Bower
5. Northern CA Veterans Museum and Heritage Center
6. California State Historic Parks: Old Shasta, Joss House etc.
7. California National Parks with historical tours, exhibits, centers or sites.
8. Lassen National Park Kohm-Yah-mah-nee Visitor Center and Loomis Museum, History of Lassen National Park
9. Whiskeytown National Recreation Area, Carr Power House etc.
10. [www.ShastaCountyHistory.com/](http://www.ShastaCountyHistory.com/) Dottie Smith
11. Other County Named Historical Societies (depending on desired reach Trinity Historical Society and others)

Based on community input and online research the five strongest competitors appear to be Turtle Bay Exploration Park, One Safe Place, Shasta Lake Heritage and Historical Society, State and National Parks. While these five organizations share the strength of being successful with their audiences, services provided by each organization differ vastly.

1. Turtle Bay Exploration Park and Museum operates successfully through a multi-pronged approach to funding local membership, corporate and organizational sponsorship and fundraising. However, even for the outstanding park and museum these methods have proved challenging to sustain the non-profit. So they have opted for the addition of the Sheraton Hotel and restaurant to provide sustainable income. Turtle Bay's target market consists of young families, local educational institutions and tourists. Turtle Bay offers the community a recreational, educational resource and gathering place. Individuals donating to this organization will be motivated by the importance of historic, artistic and educational recreation for families and students.
2. One Safe Place operates based on fundraising appeals, donations, state and federal grants and a number of local events for the community. One Safe Place offers a vastly different service than Turtle Bay. The non-profit assists members of the Redding and Shasta County community who are in domestic violence crisis. Individuals donating or involved with this organization will be motivated by compassion to assist individuals in need and to create a more healthy society.
3. Shasta Lake Heritage and Historical Society operates based on membership fees, individual donations and corporate sponsorships. Supporters of the organization would be motivated by commitment to the committee and preservation of history of the community and Shasta Dam.
4. State Parks with historical exhibits or tours are primarily operated through state funding in addition to admission fees from local visitors and tourists. Supporter would be motivated to pay for admission fees to access beautiful parks in addition to historical exhibits.
5. National Parks with historical exhibits or tours operate through federal funding in addition to park admission fees from locals and tourists. Supporters would be motivated to support the parks by the services offered, access to beautiful parks with recreation, in addition to the historical exhibits.

In order to distinguish itself from its competitors the Shasta Historical Society could adopt any or all of the following strategies:

1. Create multiple streams of income: membership, corporate sponsorship, grants, fundraising appeals, and events to raise money.
2. Develop video campaigns that educate the County about its history.
3. Create new or further develop current engaging historic programming, events, tours and services that appeal to growing target markets of Shasta County school systems, higher education institutions, young families and tourists.
4. Expansion of services offered to member
5. Develop distinct historical topics (Shasta County: leader in historical recreational resource management", history of logging, history of construction and engineering.) unique to Shasta County; develop programming around these topics to draw researchers, locals and tourists.

\*Further suggestions for improvement and distinction are listed in the "Recommendations" section.

#### IX. Mission Statement

The current mission statement of the Shasta Historical Society is to "actively preserve, promote and bring to life the history of Shasta College."

Stakeholders, board members and the community were surveyed to determine how accurately the mission statement describes the activities and services of the Historical Society. The responses from all three groups overwhelmingly agreed that the mission statement is an accurate representation of the Shasta Historical Society.



## X. Marketing Strategies

The marketing strategies section below details my recommendations for the Shasta Historical Society. These recommendations and suggestions for improvement will require further investigation and prioritization by the Shasta Historical Society. I would recommend that clear prioritized goals be defined by the Historical Society and then each of these recommendations be evaluated based on the goals that need to be reached. If the Shasta Historical Society needs further assistance to identify the highest priority goals for advancement Krista Buckel Consulting would be happy to assist.



### A. Campaigns

Create interesting and engaging campaigns that showcase the best of Shasta County history. Identify clear topics and messages for marketing campaigns and promotional pieces to ensure that each marketing effort supports that message and creates a specific call to action. For example if history of businesses was selected a topic a video campaign could be used online and in school presentations to teach about the history of businesses, the Stagecoach should have an article showcasing business history, social media posts should be able history of businesses, a historical tour of these businesses could be created and listed on the website, an article in the Record Searchlight could be written about the theme and activities for the community. Each promotional avenue should have a specific call to action, which should support the goal of the campaign. If the goal is to obtain more members all materials should have information or a link to information on how to become a member. An annual strategic meeting should be held to develop marketing initiatives, goals and basic campaign concepts for the next year. Campaigns should support the organizations overarching goals (i.e. increase membership under the age of 45, increase community value for organization).

### B. Improve in person Customer Service

I would recommend that the Shasta Historical Society either develop a reliable group of volunteers who are consistently able to provide in person, quality customer service for potential members or current members who come by the Historical Society location. If volunteers are not reliable an additional employee may be needed to greet and assist guests and/or calls.

### C. Develop Communication Flow

Develop a flow of communication for individuals or members to determine what information you want them to receive to guide them toward the next step of involvement.

### D. Print

A list of necessary print promotional pieces should be established based on how they meet the overall goals of the Shasta Historical Society. Based on the research gathered I would recommend making the following changes to current print pieces:

- Stagecoach: Leverage the newsletter by using it to distribute themed historical articles to support campaigns. Add member spotlights to promote brand loyalty. Consider additional layouts to add variety and visual interest.
- The Covered Wagon: Add more photos to create visual interest. Submit the publication to the California Historical Society for their publication awards.
- Shasta Historical Society Annual Calendar: Great promotional piece for members. Offer to schools and teachers as well. Include historic dates in a calendar on the Shasta Historical Society website.
- Membership Flyer: Completely redesign the membership brochure. Combine a donation form in the brochure that can be torn off and submitted separately and be sure to include volunteer information as well.
- Walking Tour Donation Envelope: Add the ability to donate by credit card (create form on envelope.) Set up a square account that is linked the Historical Society's

bank account so that credit card donations can be made electronically. Or set up a text number that allows individuals to donate via text.

- Pioneer Plaque Flyer: This information could be incorporated into the main membership brochure if this program is to be continued.
- Record Searchlight Monthly Article: Organize volunteer writers to draft articles that correspond to established campaigns. Submit articles monthly to the Record Searchlight.
- Fundraising appeal letters: Be sure to demonstrate the value, successes and forecast future goals of the Historical Society in these communications.

#### E. Web

The current Shasta Historical Society website is outdated and not able to accommodate the technology necessary for the Historical Society to grow and attract new members. The site as is does not provide an infrastructure that will be able to support the current or future marketing needs of the Society. I would recommend a complete redesign of the Shasta Historical Society website. The site needs to have a clean and uncluttered homepage. Messaging should be clear and concise with 1-2 main areas of attention. A call to action should be easy to recognize. What do you want your online guests to do? Sign up to become a member? Sign up for your newsletter? These messages should be tied back to the Shasta Historical Societies goals. If the Society would like assistance with prioritizing these goals I would be happy to assist with the further development of goals. When a new site is designed I would recommend including these elements or changes into the new website:

- Create a blog that provides up to date information about history and activities at the Historical Society.
- List all other historical organizations in Shasta County on the Shasta Historical Society's website with logos as partners. Encourage consumers seeking historical information to contact Shasta Historical Society regarding the best locations to find the historical data they seek.
- Consider developing content pages or programming surrounding each historical landmark in Shasta County and the surrounding area.
- Add sign up for e-newsletter to website
- Edit and update the Wikipedia page listing for National Register of Historical Place listings in Shasta County, CA.
- Add list of all historical museums and tours in area: Eaton house, Turtle Bay, Shasta Dam etc.
- Add a list of all key historical icons in County to the website with photos and descriptions.
- Consider video campaigns to promote historical icons in area, historical tours and programming.
- Incorporate videos, social media feeds and other technology upgrades into website.

#### F. Social Media

- Create engaging and interesting social media campaigns that promote the Shasta Historical Society to millennials and young families. See photo samples of campaign ideas in Appendix.
- Apply the 80/20 rule for social media posts. 80% of the information posted should be non-sales oriented information that would be of interest to your audience. 20% of posts should be specifically promoting the Shasta Historical Societies programs, events and activities.

#### G. Business Development

It may be useful to develop a committee with a representative from each historical group in Shasta County to strengthen partnerships and generate ideas. If a committee is not feasible, meeting with each of the potential stakeholders or partners in person to share

vision and identify key needs and areas of partnerships will be important to the growth and viability of the Historical Society.

- Identify key non-profit and business partners (see the suggested list above in the “potential partners and stakeholders” section)
- Identify key historical entities within Shasta County (see “potential partner list above”) and partner with them to make the Shasta Historical Society the key point of historical information for Shasta County.
- Heritage and Historical Society’s Shasta Dam Workers Reunion event on the Historical Society’s website. Developing these relationships and supporting these other historical entities will position Shasta Historical Society as the primary historical entity in the County, and other smaller organizations will feel supported by the additional publicity and traffic supplied by the Historical Society.

#### H. Pricing

Membership pricing seems too low. In order to attract a younger audience of members the Shasta Historical Society needs to create a value perception. Part of creating that perception is pricing. The Shasta Historical Society is a valuable organization and should be priced as if it has value. Younger audiences want to be able to give back to organizations. Building “giving back” into the pricing should also help the Society attract members. I would recommend increasing membership price with various membership levels. I would suggest implementing \$49 for standard membership and \$39 for legacy members, as does pricing for the Covered Wagon. In order to increase membership it may be helpful to make the Covered Wagon only available to individuals who become members. Or the price of the Covered Wagon could be increased to match the membership amount to make membership the more lucrative option. All other pricing seems reasonable.

#### I. Budget

Financing has been identified as a weakness that needs addressed. It is also an opportunity. Maintaining and increasing revenues is critical to the viability of the Shasta Historical Society. I would recommend implementing new fundraising approaches (corporate) as well as focusing on adding services that add value to the community to boost membership numbers as the best opportunities to create additional funding sources.

#### J. Marketing Goals

Based on my evaluation of the Shasta Historical Society’s areas of improvement necessary for the desired growth I would recommend that the Society focus on the following marketing goals:

- Gain new members of various age groups  
New members need to be gained to create a sustainable income and interest in the organization. Younger members in particular will be able to add new perspectives, ideas for growth, events, development etc. The research demonstrated that there is interest in the Shasta Historical Society among younger members.
- Demonstrate value of the Shasta Historical Society to the community  
This goal can be achieved in a number of ways and will be essential to the success of the organization. If the community doesn’t see value for the Shasta Historical Society they won’t want to become members and the Society will be just one more non-profit. Implementing and cultivating community interactions will be key. The research also demonstrated that younger potential members want to know that they are giving back to the community or are a part of an organization that benefits the community.
- Maintain programming for current members  
The research clearly communicated that the current Shasta Historical Society members really enjoy some of the current programming offered by the

organization. Continuing to implement current programming will be important to relate to the current membership.

- Develop new programming for younger individuals and families  
Again the research demonstrated interest in the Historical Society from a younger family oriented demographic. If the Society wishes to attract this audience and grow their membership in this area programming that appeals to these audiences will be necessary.
- Increase website visits by developing a new site with rich content  
The current site is not promoting repeat visits. Developing a new, interactive and user friendly site will keep guests coming back to the site as well as sharing it with friends.
- Increase Social Media presence with innovative campaigns  
Social media as an outlet is an excellent place to attract a younger audience to the Historical Society. One common theme in the research was younger audiences weren't aware of Historical Society, who the organization is, their events and how to be involved. Creating interactive social media campaigns will take the appropriate information about the Historical Society to the desired younger audience.
- Focus on broader distribution about Historical Society membership and events

As mentioned in section F. the research mentioned that community members aren't aware of events. Broadening marketing efforts to more widely distribute information about Historical Society events will assist the organization in growing event attendance and membership.

#### K. Measuring Results

- Number of new members
- How many events popular with members were maintained
- How many new programs or events were developed for a young audience
- Number of unique website visits, time on site and number of pages visited
- Number of new Facebook fans, level of engagement through comments and likes
- Number of distributed brochures about the Historical Society
- Number of new attendees at events

#### L. Gaining Consensus for Implementation

The survey results clearly communicate that for a non-profit to be successful it must demonstrate value to the community. Turtle Bay is an excellent example of an organization that has demonstrated value. A majority of surveyed individuals are members of Turtle Bay. A majority of those surveyed were not interested in the Shasta County Arts Council. Based on survey results the Shasta County Arts Council would be an example of an organization that has potential but has failed to demonstrate value and awareness about their organization in the community. Over half of members surveyed were interested in becoming involved with the Historical Society. These results would indicate that the Shasta Historical Society has an opportunity to create events and services that engage the community and ultimately grow membership. However, to be successful the Historical Society will need to be open to change and to creating new programming and opportunities to engage this audience.

#### XI. Recommendations

The section below contains my recommendations for the Shasta Historical Society. The recommendations are divided into short term and long-term steps. The short-term suggestions are strategies that I would recommend that the Shasta Historical Society work to implement in the next six to twelve months. The long-term suggestions could be implemented in the next 1-3 years.



SHORT TERM

- A. Differentiate and add value: I would strongly recommend that the Historical Society place a great deal of time and thought into developing creative ideas to set themselves apart from other historical entities and other non-profits in the area. Here are a few ideas to consider:
- Offer to be hub of historical information to all other historical organizations. Offer to promote their historical events on the Shasta Historical Society's website. Promote all things historical.
  - Select a few areas of historical strength for Shasta County and the region and begin to establish the Historical Society as experts in this field of history.
  - Create creative marketing campaigns that demonstrate the value of history and its importance in shaping the future. (like history of industry videos, historical awards etc)
  - Create activities that create engagement between the community and its local history. (Historical photo contests that culminate in a reception at the Shasta Historical Society)
  - Consider partnering with Turtle Bay to create seasonal, historical exhibits that focus on a theme common within Redding history. Something that's not already represented at Turtle Bay. These exhibits could be held at the Historical Society or Turtle Bay.
  - Consider creating a variety of historical free tours that cover each area of the city.
  - I would recommend an extensive website redesign
  - I would recommend upgrading technology to offer archives on the website, interactive videos etc.
  - I would recommend the redesign or creation of additional print pieces for each of the following: membership information, volunteer information, list of events and fundraising. These can be individual brochures or could be combined into one brochure with a tear out for fundraising donations.
  - I would recommend create 1-2 themed marketing campaigns per year to promote specific initiatives of the Society. These should not be related to fundraising, but should focus on informing the community about the Historical Society, it's programming and the value of history.
  - I would recommend creating a editorial calendar that coordinates all marketing efforts in one spreadsheet and which campaign they are promoting to ensure efforts are cohesive and effective.
- B. Partner with Turtle Bay: 70% of those surveyed are members of Turtle Bay. 59% of those surveyed are interested in being involved with the Shasta Historical Society. I would recommend approaching Turtle Bay to deepen the level of partnership by created a dual membership: Turtle Bay and Shasta Historical Society. This would also create an additional stream of revenue.
- C. Community members identified being interested in attending Historical Society events. Create historical events that appeal to the current audience and a younger demographic. Create a focus group of younger community members to identify ideas for implementation.
- D. Create Family Friendly programming: most of the individual surveyed wanted to attend historical events or become a member. Providing historical events that cater to families will increase the likelihood of the purchase of dual membership with Turtle Bay.
- E. Engage a younger audience in Redding by appealing to their self-identified interest in participating with the society through events, volunteering and membership. Create opportunities for younger individuals to be involved besides becoming a member. (i.e. create innovative social media campaigns, history of industry and business in Redding campaign, create access to archives on Shasta Historical Societies website, help plan Historical Society events, assist in selecting events and programming themes)



- F. Maintain programming for current membership base. I would recommend continuing to provide services that are most important to your core membership. The majority of individuals surveyed were over the age of 55. Maintaining services and membership perks most important to these individuals will be key to retaining current membership numbers.
- G. Highlight positive historical strengths, trends and contributions that Redding has made in the past. Give locals young and old something to be proud of.
- H. Achieve this through innovative campaigns (Then and now, Remember when, sponsor historical contests city-wide, create historical scavenger hunts and partner with existing popular events to add an educational element to their event. Asphalt Cowboys treasure hunt is a good example.)
- I. Create media that communicates history of Redding (short 1-2 minute videos, graphics, historical timeline of Redding, historical walking maps)
- J. Develop brand loyalty by frequently reporting to members about successes and future plans of the Historical Society. Create member spotlights and highlight volunteers who have donated numerous hours to the Historical Society. Remind them why they are valuable, why the Society is valuable and provide one action step for them to take. This can be as simple as reminding them of an upcoming event to attend, offering specific volunteer opportunities or writing a historical article to be published in the Record Searchlight.
- K. Try unique fundraising efforts that relate to historical concepts. The Taste of History is an excellent example of a successful event/fundraiser that pairs fun with history to draw out the general public to support history in Redding.

#### LONG TERM

1. Develop a video campaign that showcases the history of industry and successful businesses in Redding. Partner with local businesses to develop these videos for the Shasta Historical Society website and social media. These videos could be given to current existing businesses and given to the EDC to promote the excellence of business in Redding. The campaign would promote the history of businesses in Shasta County; demonstrate the value that the Historical Society brings to the community by supporting local industry and enhancing the perception of Redding outside the area.
2. Develop a e-newsletter to appeal to younger audiences
3. Develop historical awards that are given away by the Historical Society to the community. Create several categories like a) A student that is making history in Redding b) A teacher that is promoting the value of history in and outside their classroom c) A business that has made history/ or has demonstrated value for history within the community etc.
4. Hold an annual event where history awards are distributed with a keynote speaker who speaks on the importance of knowing our history to steer us into a positive future. Use this as a fundraising event as well to generate donations for the Historical Society.
5. Begin to build historical interest in a younger audience by engaging local elementary, middle and high schools along with colleges and university history programs and clubs. Coordinate with teachers to provide extra credit for participation with the Historical Society. Create campaigns that present history in an unconventional an interesting manner.
6. Create deeper engagement with current members by letting them know that they are needed. Their time, their passion, their historical knowledge is needed. Tell members they are needed and then ask them to do something specific. Give them options, sign up to greet at an event, help organize archives, and help create events. Whatever you need help with ask them for it. This can be achieved through a newsletter.
7. Develop a historical building advocacy committee or group dedicated to actively preserving historical buildings in Redding. This committee has the potential to create greater visibility for the Historical Society as they advocate for preservation. Historical building preservation is a very common function of other successful historical societies.

XII. Appendix

A. Sample Social Media Campaign Photos

To the right is a photo that depicts a historic European location. The same principle of pairing an old photo with a new photo of iconic locations in Redding could inform and generate interest in the history of Redding and Shasta County. Campaigns similar to these could be used surrounding historical themes as well.

B. Survey Results

On file at the Shasta Historical Society

