



How to Start a History Organization Toolkit

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1. Introduction

Establishing a history organization plays a vital role in preserving and sharing local, regional, or thematic histories that are meaningful to your community. Before founding a new organization, consider whether your goals could be achieved by joining an existing group or if a less formal structure, such as a club or working group, might be a better fit. This toolkit serves as a guide and is designed to support your efforts in creating and sustaining a history organization that is relevant to your community's interests and built for long-term success.

Disclaimer:

This toolkit is intended for educational and informational purposes only. It provides general guidance, templates, and best practices to support the formation and operation of local history organizations. The materials included should not be interpreted as legal, financial, or professional advice. Users are strongly encouraged to consult with legal, financial, or nonprofit professionals before implementing any policies, procedures, or official documents. The Utah Historical Society is not liable for any decisions, outcomes, or actions taken based on the use or adaptation of the contents in this toolkit.

2. Organizing a History Organization

Before formally establishing an organization, it is essential to define its mission, scope, and goals. A clear mission statement will help guide your goals and communicate your purpose to your partners, stakeholders, members, and the public. Consider your areas of focus such as topics, themes and geographic location(s) and determine whether your focus should be broad or narrowly defined to best serve your objectives.

Identify key community members, historians, educators, and potential partners who share an interest in local or specialized history. These individuals can offer their expertise, resources, and support, and can potentially serve as board or committee members or as volunteers. These relationships strengthen your organization and ensure community investment.

Assess available resources in your community such as volunteers, scholars, community advocates, grant and donation opportunities, and other local organizations such as libraries, community centers, museums, and archives that can support your organization's mission.

3. Organizational Meetings

Hold initial meetings with interested parties to discuss the purpose, structure, and activities of the organization. Use these meetings to define the organization's mission, set preliminary goals, and outline the types of programs or services you hope to offer. Establish committees to handle various tasks, such as membership recruitment, fundraising, and program planning. Assign clear responsibilities to each committee to promote accountability and efficiency.

Take detailed notes during all meetings, recording discussion topics, decisions made, and action items for future meetings. Maintaining thorough records ensures transparency, accountability, and continuity, and provides documentation for future planning.

4. Incorporation

Register the organization as a nonprofit entity with the appropriate state authorities. This provides your organization with legal recognition, which establishes its formal existence and allows it to operate under law. Incorporation offers specific protections, such as limiting the personal liability of members, directors, and for the organization's debts or legal obligations. Check with the [Utah Nonprofit Association](#) for specific requirements and procedures for forming a nonprofit.

Resources:

- [See Section 13 of this toolkit for an Articles of Incorporation Template.](#)

5. Bylaws

Develop a set of bylaws that clearly outline how your organization will be governed and operated. Bylaws serve as the organization's internal rulebook, addressing key elements such as the governance structure including the board and officers' roles and responsibilities, membership requirements, procedures for electing leadership, the frequency and format of meetings, quorum requirements, and methods for making decisions. They should also specify how conflicts of interest will be managed, how committees will be formed, and how the bylaws can be amended in the future.

Once drafted, the bylaws should be carefully reviewed, discussed, and approved by the founding members to ensure everyone understands and agrees to the structure and processes. Bylaws provide stability and clarity as the organization grows, helping to prevent misunderstandings and conflicts. Bylaws are living documents and should be amended as the organization evolves and its needs change over time.

Resources:

- [See Section 14 in this toolkit for a Bylaws Template.](#)

6. Obtaining Tax Exempt Status

Apply for tax-exempt status with the Internal Revenue Service (IRS) under section 501(c)(3) if applicable. This designation allows the organization to receive tax-deductible donations and may provide access to grants and other funding opportunities.

The application process involves submitting [IRS Form 1023 \(Application for Recognition of Exemption\)](#) or the streamlined [Form 1023-EZ](#) for smaller organizations. You will need to provide detailed information about your organization's mission, structure, governance, financial plans, and past or proposed activities. Preparing this application requires careful documentation and a clear demonstration that your organization operates exclusively for charitable, educational, or similar purposes. You may also need to apply for exemption from state income, sales, or property taxes, depending on your organization's location and activities.

Consult legal and/or financial advisors to ensure your application is accurate and complete, and in compliance with federal and state requirements. Keeping good financial records, filing annual returns, and adhering to nonprofit governance standards is crucial for preserving your tax exempt status.

7. Records

Maintain accurate records of the organization's activities, finances, membership, and historical materials. Good record keeping is essential for transparency, accountability, sustainability, and credibility of your organization. Records should include meeting minutes, governing documents (bylaws and policies), financial documents, grant applications, correspondence, and membership information.

If your organization plans to be a collecting institution, such as a museum or archive, you need to develop a collections management policy. This includes policies and procedures for acquisitions, accessioning and cataloging material, condition reporting, and managing loans and donations. This policy should also outline how materials acquired, preserved, and made accessible to the public.

Resources:

- [See Section 15 in this toolkit for a Collection Management Policy Template](#)
- [Museum Skills Lab: Collections Policy](#)

8. Staffing the Organization

Depending on the organization's size and budget, staffing may include volunteers, part-time employees, contractors, or full-time professionals. Clearly define roles and responsibilities, whether volunteer or paid to ensure efficient operations. Develop job descriptions that outline job duties, expectations, required skills, and organizational structure. Seek out training and development opportunities to build specialized skills for your organization needs such as collections management, historical interpretation, nonprofit management, volunteer management, fundraising, and marketing. Encourage participation in workshops and webinars, and professional development opportunities.

Professional Development Resources:

- [Utah Collections Preservation](#): Provides preservation training to humanities collections stewards statewide.
- [StEPs-UT](#): Resources based on the American Association of State and Local History's (AASLH) Standards of Excellence Program for History Organizations (StEPs)
- [Utah Humanities Museum Interpretation](#): Workshop series for museum stewards to learn how to research, design, and create interpretive exhibits and educational activities.
- [Utah State Historical Records Advisory Board Training](#): Course to learn archival best practices including archive fundamentals, digital project planning, and providing access to archival collections.
- [UServeUtah Volunteer Management Training](#): Interactive and practical course providing professional development for volunteer managers.

- [AASLH Resource Center](#): A collection of resources designed to help you do good history including publications, live and recorded webinars, and audio recordings.

9. Membership

Encourage community involvement by offering various membership levels and benefits that can appeal to a wide range of people. Offering different membership tiers such as individual, family, student, senior, or organizational membership can help attract a variety of audiences. Consider providing member benefits such as discounts, access to exclusive programs and events, invitations to members-only gatherings or behind the scenes tours.

Membership dues can serve as a consistent revenue stream for the organization and also help to build a committed base of advocates who can support fundraising efforts, spread awareness, and provide valuable feedback. Consider periodically surveying members to understand their interests that can inform what your organization should offer.

10. Marketing and Outreach

Develop a marketing and outreach strategy to promote your organization's mission, program, events, and publications to your community. A strong marketing plan helps build awareness, attract new members and audiences, increase attendance, and encourage financial support. Start by identifying your key audiences such as local residents, tourists, students, businesses, history enthusiasts, etc. and tailor your messaging accordingly. Use social media platforms and/or share newsletters (print or digital) to keep your audience informed about upcoming events, highlights, volunteer opportunities, and general updates. Consider also establishing a relationship with your local newspaper and radio and television stations to share out your organization's activities. Additionally, explore cross-promoting with partner organizations such as libraries, museums, schools, and cultural groups to expand your reach. You should also regularly evaluate your outreach efforts through surveys, data tracking, and feedback forms.

11. Activities

Plan and implement programs that serve the interests of our community such as lectures, workshops, webinars, historical tours, exhibits, and community events. Collaborate with museums, schools, libraries, tourism offices, and other organizations to expand educational opportunities. Offering a variety of in-person and virtual programming can help you reach broader audiences. Partnerships are key to expanding your impact. Collaborate with schools, libraries and other community-based organizations such as senior centers, youth groups, or cultural associations. You can also encourage original research by inviting community members, students, and scholars to participate in local history projects such as articles, oral histories, and blog posts to contribute to the historical record.

Programming and Professional Development Resources:

- [UHS Oral History Program](#): Provides training, potential funding, and guidance on oral history projects.
- [Civic Season](#): Civic Season uses history to inform and inspire civic participation from Utah's Gen Z community
- [Utah History Month](#): Opportunities to raise awareness of Utah's history and amplify history work happening across our state.
- [Utah Humanities Center for Community Heritage](#): Provides museum exhibition training and opportunities to host a Smithsonian Museum on Mainstreet traveling exhibition.
- [AASLH Resource Center](#): Provides professional development resources designed to help you do good history work.

12. Sustaining and Growing the Organization

Once your history organization is established, it's important to focus on sustainability and long-term growth. A combination of funding strategies, community relationships, advocacy efforts, and regular evaluation can help your organization remain active, relevant, and impactful.

12.1 Fundraising

To support your work, develop a mix of funding sources. Apply for grants, seek donations from individuals and businesses, and plan fundraising events such as tours, auctions, or benefit dinners. Be sure to thank supporters and show how their contributions make a difference.

Resources:

- [GuideStar](#): A comprehensive database that provides information on the missions, programs, finances, leadership, and impact of nonprofits.
- [Governors' Office of Economic Opportunity Center for Rural Development](#): Provides grants for rural counties, cities, and towns to support unique economic projects and activities.
- [GrantStation](#): Database featuring funding opportunities for Utah nonprofits.
- [Utah GrantWatch](#): Lists corporate giving grants for nonprofits, individuals, and business grant seekers
- [Utah State Historical Records Advisory Board \(USHRAB\)](#): Awards grants up to \$7500 to cultural heritage organizations who undertake time-limited archival projects.
- [Utah Division of Arts and Museums](#): Award General Operating Support (GOS) grants for nonprofit organizations or government agencies that are museums with a physical location in Utah that are open to the public and maintain an active collection.

12.2 Partnerships

Work with other history groups, museums, schools, and local organizations to share resources and reach more people. Joint programs, shared events, and collaborations with city or community groups can increase your visibility and impact.

12.3 Advocacy

History organizations play an important role in preserving places, stories, and materials in the local community. Use your organization as a voice to support preservation policies, local history funding, or heritage tourism initiatives. You can also encourage civic engagement through campaigns, public comment, or educational programs that raise awareness about the value of history. Forming coalitions with like-minded groups can amplify your organization's reach in the community.

Resources:

- [American Association for State and Local History \(AASLH\) Advocacy Resources](#)
- [National Council on Public History Advocacy Resources](#)
- [National Trust for Historic Preservation: 10 Tips for Effective Advocacy](#)

12.4 Evaluation

To ensure organizational growth and sustainability, regularly evaluate your programs and initiatives. By gathering audience feedback and analyzing membership, attendance, outreach, and financial records, you can define and measure success. This data empowers informed decision-making and helps refine your future objectives and approaches.

Resources:

- [American Alliance for Museums \(AAM\) Museum Assessment Program](#)
- [American Association of State and Local History \(AASLH\): Approaching Evaluation](#)
- [Institute of Museum and Library Services \(IMLS\): Logic Model User Guide](#)

Articles of Incorporation Template: About this Document

The **Articles of Incorporation** is a foundational legal document that formally establishes a nonprofit organization as a legal entity with the state. Filing this document is typically the first official step in creating a history organization. It defines your organization's name, purpose, structure, and other key elements, and is required to gain recognition from the state as a nonprofit corporation.

For history organizations, the Articles of Incorporation provide legitimacy and legal standing. They also help ensure that the organization can qualify for tax-exempt status under Section 501(c)(3) of the Internal Revenue Code. This is particularly important for organizations that intend to apply for grants, accept donations, or work with public institutions.

This template offers a general outline that you can adapt to meet your organization's specific goals and the requirements of your state. Be sure to consult with the [Utah Nonprofit Association](#) and seek legal or professional advice as needed to ensure your filing meets all necessary legal standards.

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13. Articles of Incorporation Template

Articles of Incorporation of (Name of Organization)

Article I : Name

The name of this corporation shall be **(Name of Organization)**, hereinafter referred to as the "Corporation."

Article II : Purpose

This Corporation is organized exclusively for charitable, educational, and historical purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code. The specific purposes of the Corporation include, but are not limited to:

1. Preserving and promoting the history of **(region, state, or focus of organization)**.
2. Collecting, curating, and exhibiting historical artifacts and documents.
3. Conducting educational programs, workshops, and events to increase public awareness and appreciation of history.
4. Supporting research and publication on historical topics related to the Corporation's mission.
5. Collaborating with local, state, and national historical organizations to enhance historical preservation efforts.

Article III : Registered Agent and Office

The registered office of the Corporation is located at:

(Address)

The registered agent at this location is **(Name of Registered Agent)**.

Article IV : Nonprofit Status

This Corporation is organized as a nonprofit and shall not engage in activities that result in private financial gain for members, directors, or officers. No part of the net earnings shall inure to the benefit of any private individual or entity, except as reasonable compensation for services rendered in furtherance of the Corporation's mission.

Article V : Membership

The Corporation shall have **(membership structure, e.g., voting or non-voting members, categories)** members. The qualifications and rights of membership shall be established in the Corporation's Bylaws.

Article VI : Board of Directors

The affairs of the Corporation shall be managed by a Board of Directors, which shall consist of not less than **(minimum number)** and not more than **(maximum number)** members. Directors shall be elected or appointed in accordance with the Corporation's Bylaws.

Article VII : Dissolution

Upon dissolution of the Corporation, all remaining assets, after the payment of debts and liabilities, shall be distributed to a nonprofit organization recognized under Section 501(c)(3) of the Internal Revenue Code with purposes similar to those of this Corporation, as determined by the Board of Directors.

Article VIII : Amendments

These Articles of Incorporation may be amended by a majority vote of the Board of Directors and in accordance with applicable state laws.

Article IX : Incorporator(s)

The name(s) and address(es) of the incorporator(s) are as follows:

(Name of Incorporator(s))

(Address)

In witness whereof, the undersigned has executed these Articles of Incorporation this **(Day)** of **(Month, Year)**.

(Name of Incorporator)

(Signature)

(Title)

Bylaws Template: About this Document

Bylaws are the internal rules that govern how a nonprofit organization operates. While the Articles of Incorporation legally establish the organization with the state, the bylaws define its day-to-day functioning, structure, and decision-making processes. Together, these documents form the foundation of a well-organized and transparent nonprofit.

For a history organization, bylaws are essential for establishing how the group will be structured, who can be a member, how board members are selected, how often meetings occur, and how financial matters are handled. They also help ensure accountability and consistency in leadership transitions and long-term planning. Bylaws can be particularly important when applying for tax-exempt status, managing grants, or working with public agencies and partners.

This template offers a general outline and should be customized to reflect the specific mission, size, and goals of your organization. The document can grow and evolve with your organization and it is common for bylaws to be amended as needs change.

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14. History Organization Bylaws Template

Bylaws of (History Organization Name)

Article I: Name and Purpose

Section 1. Name

The name of this organization shall be (History Organization Name) (hereafter referred to as "the Organization").

Section 2. Purpose

The Organization is a nonprofit entity dedicated to preserving, interpreting, and promoting the history of (specific region, community, or focus). Its objectives include:

1. Collecting, preserving, and making accessible historical artifacts, documents, and oral histories.
2. Organizing educational programs, exhibits, and public events.
3. Encouraging research and scholarship in historical studies.
4. Collaborating with other institutions, organizations, and the public to further historical awareness.

Article II: Membership

Section 1. Eligibility

Membership is open to all individuals, institutions, and organizations that support the mission of the Organization.

Section 2. Categories

Membership categories may include Individual, Family, Student, Institutional, and Lifetime memberships as determined by the Board of Directors.

Section 3. Dues

Membership dues shall be established by the Board of Directors and are payable annually.

Article III: Board of Directors

Section 1. Composition

The Board of Directors shall consist of (number) members, including officers and at-large members.

Section 2. Officers

The officers of the Organization shall be:

1. President
2. Vice President
3. Secretary
4. Treasurer

Section 3. Terms and Elections

Board members shall serve (term length, e.g., two years), with elections held at the annual meeting.

Section 4. Responsibilities

The Board shall oversee the activities, finances, and policies of the Organization.

Article IV: Meetings

Section 1. Regular Meetings

The Organization shall hold regular meetings at least (number) times per year.

Section 2. Annual Meeting

An annual meeting shall be held for the purpose of electing board members, reviewing the Organization's activities, and discussing future plans.

Section 3. Special Meetings

Special meetings may be called by the President or by a majority of the Board.

Article V: Committees

The Board may establish committees as needed, such as:

1. Collections and Archives
2. Events and Programs
3. Membership and Outreach

4. Finance and Fundraising

Article VI: Financial Management

Section 1. Fiscal Year

The fiscal year shall begin on (date) and end on (date).

Section 2. Financial Oversight

The Treasurer shall oversee financial records, present reports, and ensure compliance with nonprofit regulations.

Article VII: Amendments

These bylaws may be amended by a two-thirds vote of the Board at any official meeting, provided that proposed amendments have been shared with members at least (number) days in advance.

Article VIII: Dissolution

In the event of dissolution, the Organization's assets shall be distributed to a nonprofit institution with a similar mission.

Adopted on (date).

Collections Management Policy Template: About this Document

A **Collections Management Policy** is a critical guiding document for any organization that stewards historical materials such as artifacts, documents, photographs, or digital content. It outlines the policies and procedures for acquiring, caring for, and the public accessibility of the collection.

For a history organization, this policy ensures that collecting practices align with its mission and ethical standards. It helps establish transparency and accountability for decisions about what to collect, how items are preserved, who can access them, and how to responsibly remove items from the collection. Having a clear and formalized collections management policy is especially important if your organization seeks to secure grants, build public trust, or collaborate with partners and stakeholders.

This template offers a foundation for developing your own policy and includes key sections such as acquisition, care and preservation, access, loans, and legal and ethical guidelines. It should be adapted to suit your organization's mission, capacity, and goals.

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15. Collections Management Policy Template

Mission Statement

(Name of Organization) collects, preserves, and interprets historical materials that document the history and culture of (region, community, or theme). The collection serves as a resource for research, education, and public engagement.

Scope of Collections

The collection consists of artifacts, archival materials, photographs, and other historical items relevant to the mission. Materials are acquired based on their historical significance, provenance, and relevance to the collection.

Acquisition Policy

Methods of Acquisition:

- Donations
- Purchases
- Bequests
- Exchanges
- Field collections

Criteria for Acquisition:

- Relevance to the mission and collection scope
- Provenance and authenticity
- Physical condition and preservation considerations
- Legal and ethical considerations, including compliance with laws and museum best practices

Acquisitions Committee:

An Acquisitions Committee, composed of staff and designated advisors, will review potential acquisitions to ensure alignment with the mission and collection scope. The committee meets regularly to consider new items for the collection and makes recommendations based on the established criteria. Final decisions are documented and retained with the acquisition records.

Documentation:

All acquisitions must be documented with a signed deed of gift, purchase agreement, or other legal instrument, and entered into the collection database.

Loans

Incoming Loans:

- Materials may be borrowed for temporary exhibitions, research, or special projects.
- Loan agreements must be completed, specifying duration, condition, and responsibilities.

Outgoing Loans:

- Materials may be loaned to reputable institutions for exhibitions, research, or educational purposes.
- Borrowing institutions must meet security, environmental, and insurance requirements.

Care and Preservation

- All collection items will be stored and displayed in environments that meet museum standards for temperature, humidity, and light exposure.
- Regular assessments will be conducted to ensure conservation needs are met.
- Handling procedures will be established to minimize deterioration.

Note: While these guidelines reflect best practices based on professional museum standards, your organization should adapt preservation strategies to align with your available resources, space, and staffing. These policies are intended to be scalable and more importantly is a thoughtful, consistent approach to stewardship that provides realistic long-term preservation methods for your collection.

Access and Use

- The collection is accessible to researchers, educators, and the public through exhibitions, programs, and by appointment.
- Reproductions and digital access will be made available when possible.
- Restrictions may apply to sensitive or fragile materials.

Deaccessioning and Disposal

Criteria for Deaccessioning:

- Lack of relevance to the mission
- Deterioration beyond repair
- Redundancy within the collection
- Ethical or legal concerns regarding ownership

Disposal Methods:

- Transfer to another institution
- Sale, with proceeds used for collections care or acquisitions
- Ethical destruction if no other options exist

Ethics and Legal Compliance

- The organization adheres to professional ethical standards, including those of the American Alliance of Museums (AAM) and the Society of American Archivists (SAA).
- Compliance with federal, state, and international laws governing cultural heritage and intellectual property is required.

Review and Revisions

This policy will be reviewed every (e.g., five) years and updated as necessary to reflect best practices and institutional needs.

Approved by: (Name, Title)

Date of Approval: (Date)

Note: While these guidelines reflect best practices based on professional museum standards, your organization should adapt access and preservation strategies to align with your available resources, space, and staffing. These policies are intended to be scalable and what is most important is a thoughtful and consistent approach to stewardship that provides realistic long-term preservation for your collection.