



The Institute of Heraldic and Genealogical Studies Strategic Plan 2025 – 2028

1. Introduction

The Institute of Heraldic and Genealogical Studies (IHGS) has been a leading authority in heraldry and genealogy for over sixty years. We remain dedicated to advancing the study, research, and preservation of these disciplines. In this strategic phase, we are focused on broad-based, integrated initiatives that promote innovation, accessibility, and collaboration ensuring that heraldic and genealogical studies continue to thrive in a modern context.

2. Context

Historical and Cultural Relevance

Our longstanding tradition is deeply rooted in the preservation of cultural heritage, with an emphasis on family histories, heraldic traditions, and scholarly research.

Technological Advancements

Rapid technological change offers new tools for digital transformation. We aim to harness these advancements to enhance data analysis, online research capabilities, DNA research and archival preservation.

Economic and Environmental Considerations

Sustainable growth and responsible management of resources are central to our strategy, ensuring that we are resilient in the face of economic and environmental challenges.

3. Our Strategy

Vision

To be the leading institute for the study, preservation, and promotion of heraldic and genealogical heritage, fostering a deeper understanding of family histories, cultural identities, and the importance of genealogy and heraldry in modern society.

Mission

The Institute of Heraldic and Genealogical Studies is dedicated to advancing the study of heraldry, genealogy, and family history through education, research, and public engagement. We aim to provide a comprehensive understanding of these disciplines, support individuals in tracing their ancestry, and advocate for the preservation of historical records and cultural traditions.



Goals

- Deliver comprehensive, high-quality educational courses and resources in heraldry and genealogy.
- Digitise and expand access to archival and research materials.
- Foster dynamic partnerships with academic institutions, museums, cultural organisations, and technology providers.
- Be financially resilient, targeting a variety of income streams including maintaining and developing existing revenue generating opportunities, and seeking external funding where appropriate.
- Ensure that the organisation is well managed as a charitable business, understanding and embracing its purpose, creating an adaptable and responsive culture, and consciously following Good Governance and Charity Commission guides.

Values

Charity Values

Our values are the basis for planning, monitoring and reviewing all activities, expenditure, policies and decision making

1. **Integrity** – We are committed to conducting our work with the highest ethical standards, ensuring accuracy, honesty, and transparency in all aspects of our research and education and where openness and respect is expected of all.
2. **Inclusivity** – We value diverse cultural, historical, and familial backgrounds and strive to make genealogical and heraldic knowledge accessible to people of all backgrounds and interests.
3. **Education** – We believe in the power of education to enrich lives. We provide resources, training, and support to individuals seeking to explore their genealogical and heraldic heritage.
4. **Preservation** – We are dedicated to the conservation of historical records and artifacts, ensuring that future generations can benefit from the rich legacies of the past.
5. **Collaboration** – We foster partnerships with other institutions, researchers, and organisations to further the global understanding and appreciation of heraldry and genealogy.
6. **Community** – We prioritise creating a sense of belonging and community for all who are interested in the study of heraldry and genealogy, from novice learners to seasoned researchers.
7. **Innovation** – While respecting tradition, we embrace modern technologies and methodologies to enhance our understanding of heraldry and genealogy, enabling new discoveries and enriching our educational offerings.
8. **Wellbeing** – IHGS cares about the well-being of every member of staff, volunteer, board member and customer.
9. **Teamwork** – We value our staff team and invest in them and believe in teamwork which also fosters a focus on exceptional customer service.



4. Our Enablers

Research and Archival Resources

- **Objectives:**
 - Develop and deliver a new speciality in DNA including research services and training courses.
 - Develop and modernise our archival storage facilities and access to our library resources.
 - Review the use and purpose of our Northgate building identifying and implementing new and innovative uses of the resource.

Engagement and Public Participation

- **Objectives:**
 - Develop an annual conference/fair that brings together experts and enthusiasts.
 - Design accessible online courses and webinars
 - Implement public engagement initiatives—including tailored programmes to inspire youth interest in the fields of genealogy and heraldry.
 - Create an effective Audience Engagement Strategy to make IHGS a more valued organisation for all our existing potential audiences.
 - IHGS will be visible to and communicate with its audiences using a wide range of accessible marketing and promotional activities to ensure maximum awareness and effectiveness of activities.

Our People

- **Objective:**
 - IHGS must continue to become more dynamic, resilient and sustainable, including developing additional capacity and ensuring that appropriate skills and training are available within the staff and trustee team to deliver the strategy

Partnerships

- **Objective:**
 - IHGS will seek out collaborative opportunities with a diverse range of partners and audiences. It will become an active participant in networks to bring fresh perspectives and develop effective partnerships with genealogical and heraldic organisations, but also with others in the broader cultural and heritage sectors locally, nationally and internationally.



5. Connecting Themes and Resources

- **Accessibility, Inclusion, and Diversity:**
We commit to making all resources widely available and accessible to varied audiences, ensuring that every individual can participate in our cultural legacy.
- **Digital Transformation:**
Embracing digital tools and innovative technologies—such as AI-driven family tree analysis to elevate research and educational experiences.
- **Financial Sustainability and Growth:**
Implementing diverse funding strategies to secure financial resources, including membership programmes, grants, and revenue-generating digital services.
- **Research and Policy Development:**
Playing a proactive role in shaping scholarly research and policy recommendations, advocating for best practices in historical preservation and genealogical methodologies.
- **Technological Integration:**
Continuously integrating cutting-edge technologies to enhance our research, archive management, and public engagement strategies.

6. Conclusion

The period from 2025 to 2028 marks a transformative phase for IHGS. By adopting an integrated, non-incremental approach, we set clear, comprehensive objectives that transcend yearly benchmarks. Our strategy is built on collaborative research, innovative education, and enduring partnerships—ensuring that heraldic and genealogical studies remain vibrant, accessible, and relevant for generations to come.