

IDAHO STATE HISTORICAL SOCIETY



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## Mission

Idaho State Historical Society preserves and promotes Idaho's cultural heritage

## Vision

Our vision is to inspire, enrich and engage all Idahoans by leading the state in preserving and sharing our dynamic cultural heritage.

## Values

- Customer Service
- Stewardship
- Education
- Professionalism

## Goals

### Goal 1

**Customer Service: Provide access and high quality customer service to all Idahoans.**

Objectives(s):

- A) Enhance our understanding of current and future customers through a survey conducted every three years.

Performance measure: % of surveys returned

Benchmark: Collect at least 500 responses agency wide.

- B) Redesign program to create new compelling services inspired by our unique resources, target audience(s), optimized delivery method(s), and opportunity for earned income.

Performance measure: Number of new or enhanced programs developed to meet customer needs.

Benchmark: Create one new or enhanced program annually.

Benchmark: 10% of resources reallocated annually to new or enhanced program.

### Goal 2

**Funding and Growth: Optimize and enhance funding opportunities and partnerships.**

Objectives(s):

- A) Develop and implement a comprehensive funding plan that includes private philanthropy, grant programs, earned

income, capital campaign, and membership revenues.

Performance measure: % implemented annually over 5 years.

Benchmark: One component completed each year.

- B) Create and implement a prioritized capital improvement plan.

Performance measure: # of projects implemented and completed annually.

Benchmark: Conduct annual analysis of projects to ensure timely completion.

Benchmark: Develop four Historic Structures Reports (HSR) to inform priorities.

- C) Create and implement an annual agency plan based on aligned budget priorities, work groups plans, and individual staff goals.

Performance measure: Annual update of plan.

Benchmark: Complete of 70% of work plan goals.

### **Goal 3**

#### **Marketing: Optimize public awareness and participation in agency services through enhanced brand identity, outreach, and marketing**

Objectives(s):

- A) Create and implement a comprehensive marketing plan

Performance measure: % created and implemented annually over 5 years.

Benchmark: One major feature story per month.

- B) Enhance public awareness through media coverage.

Performance measure: Number and sources of coverage

Benchmark: Maintain or exceed current coverage from previous year.  
Increase use of ISHS services

- C) Increase use of ISHS services.

Performance measure: Number of services utilized by patrons.

Benchmark: Maintain or exceed current usage from previous year.

#### **Goal 4**

**Training: Build a uniform orientation and training program that optimizes skills necessary to achieve the Agency's strategic plan and vision.**

Objectives(s):

- A) Provide up-to-date and compelling orientation.

Performance measure: Number of orientations provided during the fiscal year

Benchmark: Each new employee oriented within 30 days.

- B) Create a training program that enhances organizational development and individual skills to maintain excellence in professional standards.

Performance measure: # of training opportunities per year.

Benchmark: Offer four all-staff training opportunities related to organizational development.

Benchmark: Offer appropriate number of training opportunities for team training based on annual agency plan and resources.

Benchmark: Offer appropriate number of training opportunities for individuals based on individual goals and work group resources.

#### **Goal 5**

**Organizational communication: Improve internal agency communication to enhance agency-wide understanding and implementation of plans, policies, and procedures.**

Objectives(s):

Performance measure: Staff participation in annual survey about internal communication and work environment.

- A) Create and implement a comprehensive internal communication plan that nurtures open communication and fosters a positive work environment.

Benchmark: Staff participation in annual survey exceeds 80%.

Benchmark: Maintain or improve internal communication.

Performance measure: Participation of staff in scheduled

meetings.

- B) Conduct deliberate and substantive staff meetings.  
Benchmark: Staff participation meets or exceeds 90%.
- C) Develop and implement agency-wide calendar.  
Performance measure: Frequency of updates  
Benchmark: Update calendar at least monthly.
- D) Distribution of plans, policies, and procedures through agency policy manual and intranet website.  
  
Performance measure: Number of updates.  
  
Benchmark: Update agency policy manual annually.  
  
Benchmark: Update intranet website quarterly.

## **BUDGET PRINCIPLES AND AGENCY PRIORITIES**

FY 2010

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### **IDAHO STATE HISTORICAL SOCIETY**

#### **GENERAL PROGRAM STATEMENT**

The Strategic Plan of the Society guides all Agency activities. From this plan and needs identified throughout the fiscal year, the Agency's leadership annually assesses and prioritizes numerous challenges and opportunities. To maximize the allocation of current and future financial and human resources, the following budget principles were created to focus fund development and resource allocation efforts; the 7 Agency priorities will guide the 2010 projects noted in the work-group annual plans. Both of these elements will inform the recommendations to the Board of Trustees for the FY 2011 proposed budget.

These priorities were based on challenges and opportunities that arose during the past year or reflected major capital projects in process. Successful completion of these priority projects will require resources and collaboration from all work groups and include:

#### **Budget Principles for FY 2010**

- Manage any further budget reductions through objectives intended to keep service levels high with minimum impact to personnel services.
- Focus resource re-allocation on services that are mission-based and generate substantial fee-based revenue.

- Research, evaluate, and implement private-sector partnerships to enhance service delivery and increased operating revenue, especially in commercial-oriented ventures, such as retail, rental, and commercial use of collections.
- Review and streamline best-practice procedures to decrease costs and improve productivity.
- Increase marketing efforts to enhance public awareness of ISHS services and drive additional attendance, thereby increasing fees-based revenues.
- Give priority for new resource development to membership and annual fund (for constituent building and increased operating revenue), sponsorships (to shift high-profile projects from general fund to long-term sponsor agreements); strategic grant acquisition (for priority capital and one-time projects), and long-term major donor cultivation (in preparation for future museum capital campaign).

#### **Agency Priorities**

1. Capitol (furniture restoration, education program planning, permanent exhibition, oral history program, photo reproduction, cataloging)
2. Completion of Capital Projects in Progress (Pioneer Village, PARL shelving, Franklin, Stricker, Old Pen, Ag Structures legislation)
3. Development: (Fundraising, membership, private sector partnerships)
4. Customer Service Survey: (Enhance marketing, webpage, system wide CS protocol, statewide outreach strategy)
5. Section 106 analyses and impact of Federal Stimulus Program: (Rose Street Storage and ASI)
6. History Initiative: (Alignment and cross marketing of programming efforts agency-wide fy2010 capitol; plan for 2-4 years out)
7. Records Merger: (completion of study and action plan for the future)

### **IDAHO STATE HISTORICAL MUSEUM OLD IDAHO PENITENTIARY *FY 2010 goals***

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#### **IDAHO STATE HISTORICAL SOCIETY**

#### **GENERAL PROGRAM STATEMENT**

The Idaho State Historical Museum and the Old Idaho Penitentiary are the Society's premiere visitor attractions. Both serve tens of thousands of visitors each year, including over 20,000 school children. The Museum was one of the first western museums to be accredited by the American Association of Museums (AAM) in 1972 and continues to provide service to the public in accordance with the best practices and professional standards set by the AAM. The Old Idaho Penitentiary is the state's largest historic site, with 31 buildings and a vibrant interpretive program. The Museum/Old Penitentiary Department is the repository for and preserves and documents hundreds of thousands of artifacts on Idaho history including several historic buildings; offers a comprehensive exhibition program featuring the history of Idaho and the Old Penitentiary and special exhibitions on a wide variety of historical and cultural topics; and provides family and community programming that brings history to life.

#### **MAJOR GOALS AND OBJECTIVES**

### **Enhance ISHS strategic development**

- Provide leadership and support to “Training” “Funding and Growth” “Customer Service” and “Internal Communications” teams and implement prioritized recommendations including 4 training sessions annually, assessment of AASLH/related surveys, membership development, and enhanced communication measures
- Provide leadership and support to Agency Directives
- Provide resources as requested to advance agency priorities

### **Capitol Project**

**(Agency Goal 1: Capitol (furniture restoration, education program planning, permanent exhibition, oral history program, photo reproduction, cataloging)**

#### **Oversee Project Management for Capitol Exhibition (Fred, Jody)**

- Provide project management of the Capitol Exhibit project including choice of design firm and the oversight of the design, fabrication and installation process.

#### **Advise and help plan for school education program at the Capitol including working on a proposed curriculum and scheduling plans. (Kurt, Rachelle, Amber)**

- Present program to the Capitol Commission on the appropriate steps needed to create a successful education program.
- Work with LSO staff members and teachers focus group to plan for an appropriate educational program for the Capitol.
- Propose a curriculum for and present options and recommendations for Capitol Education program.
- Advise on implementation of proposed school group program to begin in fall of 2010.

#### **Provide curatorial assistance for Capitol collection (Sarah)**

**Enhance Public Access and Utilization of Museum and Old Idaho Penitentiary Sites**  
**(Agency Goal 3: Development: Fundraising, membership, private sector partnerships, admission)**

#### **Develop & Maintain Permanent/Temporary Exhibit Plan for 2009/2010 Museum Permanent/Temporary Exhibit Schedule**

- History of Boise Exhibit (7/2/2009 opening)
- Darfur: Journalists Respond (6/4 -7/31, 2009)
- Develop and install exhibits in Lewis & Clark Discovery Trail (open 9/2009).
- Install and present “Immigrant Shadows” (8/10-8/31).
- Boise City Department of Arts & History Employee Exhibit (9/3 – 9/14)
- Partner with Idaho Commission on the Arts/develop & present Cowboy Art Exhibit (October).
- Boise Weekly Cover Art Exhibit and Auction (November)
- Alan Stanford Paintings “Idaho Historical Landscapes” (December ---)

April)

#### **Old Penitentiary Exhibit Schedule**

- Complete Visitation Room Exhibit (early summer.)
- Develop interpretive plan for Idaho Transportation Exhibit (summer).
- Develop a plan for future Electrical Museum upgrade (fall).

#### **Ongoing Upgrade of Current Exhibits (Museum/Old Pen)**

- Continue to update exhibits in the Museum and Old Pen exhibit areas, including the Story of Idaho, the J.C. Earl Exhibit, and the Transportation Exhibit.
- Evaluate current traveling exhibit/trunk program making decisions on older dated exhibits and developing a future plan.

### **Provide suitable educational activities and programs for school children and adults**

#### **School Programs**

- Continue to provide on-site interactive history programs and tours to 4-12 school grades that meet the needs and standards of Idaho's social studies curriculum and student understanding of cultural heritage.
- Continue to provide off-site education programs for groups that are unable to visit the Museum and explore off-site programming opportunities for the Old Pen.
- Create and distribute online, the monthly Prospector Club newsletter to subscribing 4<sup>th</sup> grade classes.

#### **History Day**

- Continue to provide the History Day program to all regions of the state and look for new strategies to increase participation and funding.

#### **Family Programming**

- On the first Saturday of summer months host Hands-on History, an interactive education program at the Museum for families (summer).
- Museum will continue to participate in the city's 1st Thursday cultural night.

#### **Summer Camps**

- Continue to provide education summer camp opportunities for children during the summer months.

#### **Volunteers**

- Enhance volunteer-led educational programs and public tours through ongoing improvement of interpretation and training resources and opportunities.
- Staff assists in organizing volunteer appreciation events and services.

#### **Teachers Institutes**

- Continue to offer teachers' workshops each year (summer).

#### **Collaborations**

- Continue to partner with external groups to provide joint programming and cultural networking such as Teacher's Night Out and International Museum

Day.

- Continue to provide leadership to discussions relating to the Old Penitentiary Historic District.
- Continue to work with local and national organizations such as The Cultural Network, Boise Museum Association, Idaho Association of Museums, Western Museum Association, AASLH & AAM to enhance communication and professionalism.
- Continue to partner with BSU to provide internships and special programming.

**Provide educational and entertaining programming for visitors of all ages to the Museum and Old Idaho Penitentiary**

**Museum**

- The Museum will continue to be open for free to the general public on 1<sup>st</sup> Thursday 5:00 – 9:00 p.m.
- Museum Comes to Life will be presented on the last Saturday of September.
- Staff will work with the Friends of the Museum to present 9 Historical Brown Bags to the public on each 2<sup>nd</sup> Tuesday of the month at noon (September through May).
- Staff will work to provide Special Events when available and appropriate for the Museum throughout the year.

**Old Pen**

- Develop new programs opportunities for adults and children at different time periods to encourage and enhance visitation.
- Promote use of Old Pen for private and public community events.
- Host special events in partnership with other workgroups and entities such as Halloween tour of Old Pen.

**Work with SHPO staff to coordinate programming with sites preservation and maintenance.**

**Explore and research different funding sources and current methods of acquiring revenue for Museum and Old Pen. (Agency Goal 3: Development: Fundraising, membership, private sector partnerships)**

**Museum Store**

- Museum Store Manager will continue to ensure the smooth operation of both the store and front desk. When operation is stable, look into product development, web presence and on-line sales, and a small store outlet at the Old Penitentiary. Work to maintain product emphasis on vendors and artists from local and statewide communities, in order to better represent Idaho.

**Friends of the Historical Museum**

- Continue working with the Friends of the Historical Museum to focus on fund raising for the museum to provide needed revenue for many upcoming projects.

### **Facility Rentals**

- Look into and explore different possibilities for enhancing our facilities rental program for increased revenue for Museum and the Old Pen.
- Review facility rental cost structure and update contracts.

### **Promotion and Marketing**

*(Agency Goal 4 - Customer Service Survey: Enhance marketing, webpage, system wide CS protocol, statewide outreach strategy; others from AASLH)*

- Work on increasing our marketing and public relations capability.
- Develop web page specifically for facility rentals at the Museum and Old Pen and for the Museum Store to link into the Society's website. Include pictures of both facilities, types of venues we could accommodate and a summary of costs.

## **Complete ongoing Capitol Projects to upgrade and improve the Museum and Old Pen**

**Buildings and Grounds** *(Agency Goal # 2: Completion of Capital Projects in Progress--Pioneer Village, PARL shelving, Franklin, Stricker, Old Pen, Ag Structures legislation)*

### **Museum Expansion**

- Work with DPW and architect to finalize architectural design.
- Work to re-submit to NEH the new and improved museum exhibit planning grant.

### **Old Pen**

- Work with DPW to complete projects including new roof on the Administration Building, new roof on Territorial Cell house, repair of moat and walls surrounding the Dining Hall, new roof on 1951 Steam Plant.
- Empty Electrical Museum, determine work plan to create a workshop and gallery space.

### **Pioneer Village**

- Secure contracts and finish interpretive work in the Lewis & Clark Discovery Trail area (Mid-September opening).
- Arrange for proper security in Pioneer Village (summer).
- Install banners for the Pavilion (summer).
- Develop and install signage in Pioneer Village.
- Install Street-lights in Pioneer Village.
- Finish back step and interior hallway in the Logan House.

### **Storage Facility**

- Replace front overhead door.
- Work with SHPO to establish archaeology storage in building.

## **Continue to improve and maintain appropriate stewardship of the ISHS collections**

### **Records/Cataloguing**

- Staff and volunteers continue to enter information into the Rediscovery Database (ongoing).
- Staff & volunteers continue to photograph incoming collections (ongoing).
- Deaccession list- Staff continues to cull through the collections to find inappropriate items (ongoing).

- Train volunteer force to work with collection cataloguing.

#### **Storage Facility**

- Move objects from Old Pen to newly paved area of Storage (ongoing fall and winter).
- Organize artifacts in appropriate areas (ongoing).
- Conduct inventory of artifacts in storage facility (ongoing).

#### **Old Penitentiary**

- Continue work on removal of objects in Transportation Exhibit (summer).
- Clean, repair & properly block objects in Transportation Exhibit (summer).
- Remove artifacts from Electrical Museum.

## **STATE HISTORIC PRESERVATION OFFICE FY 2010**

### **GENERAL PROGRAM STATEMENT**

The Idaho State Historic Preservation Office was established by the National Historic Preservation Act of 1966 (as amended) to manage the state's National Register of Historic Places, maintain an inventory of

historic properties, provide funding and technical assistance to the Certified Local Governments for local preservation projects, conduct preservation planning, administer federal tax incentives for private developers who rehabilitate historic structures, work with federal agencies under Sections 106 and 110 of the Act, and provide information, technical assistance, and education to the public.

The Archaeological Survey of Idaho (including its Western Repository) was established by the legislature in 1992 (Title 33, C. 39) to be managed by the Society where it has been attached to the SHPO.

## **Major Goals and Objectives:**

### **Enhance ISHS Strategic Development**

- Provide leadership and support to Agency Directives.
- Provide resources as requested to advance agency priorities.

### **Section 106 Review**

- Develop Programmatic Agreements for identifying and treating historic properties in concert with the Advisory Council on Historic Preservation; other Federal land managing agencies; other State agencies as appropriate; Tribes; and private sector energy companies for corridor projects on or adjacent to the Snake River Plain, including Sunstone Pipeline; Gateway West; Boardman-to-Hemingway Transmission Line; Southwest Intertie; Mountain States Transmission Intertie; and the China Mountain and Cottrell Wind Farms.
- Continue to provide timely and quality reviews of several thousand Federal undertakings under terms of the National Historic Preservation Act of 1966 (as amended).
- Complete the review of 300(+) historic concrete bridges for the Idaho Department of Transportation.

### **National Register**

- Process nominations as received and continue to ensure that those forwarded to the Keeper are of high quality and meet NRHP criteria.
- Revise the National Register of Historic Places slide program by updating imagery and converting to Powerpoint with maps.
- Complete the scanning of the NRHP nominations and work with the IT Systems Coordinator to place the documents on the ISHS website where they can be accessed by the public.

### **Historic Sites Inventory**

- Complete the digitization of site records in the Registry, eliminate the remaining paper backlogs, and add the sites located on the Sanborn maps to the GIS records
- Continue to provide full operation of the new record search protocol and maintain high quality and accessibility of data.

### **Certified Local Governments**

- Provide assistance to local CLG teams in grant matching so as to ensure that our “pass through” 10% of our Federal grant actually passes through to local communities and is not returned to Federal coffers.

### **Preservation Planning**

- Print and circulate 500 copies of the Historic Mining Context.
- Submit a management plan funding proposal for the *Bear River National Historic Monument* to the American Battlefield Protection Program.
- Draft a nomination for the *Sergeant Ordway's Bed & Breakfast National Historic Monument* to the National Park Service.
- Plan for 2010 Preservation Field School at Bayhorse.

### **Federal Tax Act**

- Continue to provide quality and timely technical assistance to the public.

### **Public Education and Outreach**

- Develop a “Capitol Centennial” theme for Archaeology and Historic Preservation Month.
- Develop a museum exhibit for the *High Bar Textiles Cache* from Hells Canyon.

### **Archaeological Survey of Idaho**

- Complete the scanning of the hard-copy archive of Bureau of Land Management cultural resource reports.
- Seek approval to increase (e.g. double) record search fees.
- Continue ongoing efforts to consolidate collections at the Western Repository within buildings that meet Federal repository standards.
- Organize the annual ASI Board meeting around the theme of “collections, curation, and fees.”
- Draft legislation for the Idaho Code to provide protection for archaeological and historic resources on state land.
- Complete unfinished reports and mss for professional and popular journals and university presses.
- Develop a stabilization and preservation plan for the Redbird Beach site and an inventory survey plan for Redbird Canyon.

### **ISHS Sites**

- Continue to work with Museum and Old Idaho Penitentiary staff to coordinate programming with sites preservation and maintenance.
- Refine six year plan.
- Fill Maintenance Craftsman II position.
- Develop clear job descriptions for Maintenance Craftsman II positions.
- Take training on state contracting.

### **Old Idaho Penitentiary**

- Repair roof system on Administration Building (DPW).
- Repair roof and stabilize walls on 1890 New Cell House (DPW).
- Replace roof and stabilize walls of 1951 Steam Plant (DPW).
- Stabilize 2 Yard Guard Towers (DPW).
- Stabilize/repair moat walls of Dining Hall (DPW).
- Finalize plan for management of, and improvements to, Table Rock.
- Work with Ridge to Rivers Trail system.
- Draft a maintenance protocol.
- Plan work for Save America's Treasures, if awarded.
- Continue to seek funding for Condition Assessment or Historic Structures Report .

**Franklin**

- Maintain good communication with Pioneer Association.
- Finish interior walls and exterior repointing of Hatch House by fall 2009 (contract).
- Install interpretive exhibit in Hatch House by fall 2009 (contract).
- Finish interior walls and exterior repointing of Doney House by fall 2009 (contract).
- Install interpretive exhibit in Doney House by July 2010 (contract).
- Install exterior interpretive signs by fall 2009 (contract).
- Investigate cleaning and rethinking of log siding on Relic Hall.
- Work with Fiscal to close out TEA project.

**Stricker**

- Maintain good communication with Friends of Stricker board.
- Work with ITD and Fiscal to initiate TEA project.
- Install HVAC in interpretive center (contract).
- Begin construction on storage room, counter, and platform in interpretive center.
- Install interpretive exhibit in interpretive center (contract).
- Work with Museum to plan construction of Rock Creek store front exhibit in interpretive center.
- Control weeds/mow around Rock Creek store.
- Seek funding for outdoor interpretation.

**Pierce**

- Conduct site visit and meet local managers.
- Seek funding to replace wood shingles on porch roof (DPW).
- Conduct condition assessment, if needed (contract).

**Assay Office**

- Complete roof repairs (contract).
- Prep and paint roof (contract).
- Repoint front steps as interim measure.
- Plan work to rebuild front steps (contract).
- Complete condition assessment (contract).

**Bureau of Reclamation Building**

- Maintain good communication with Riverstone School (tenants).
- Replace wood shingles on roof (DPW).

**PUBLIC ARCHIVES AND RESEARCH LIBRARY**

*FY 2010 goals*

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**IDAHO STATE HISTORICAL SOCIETY**

**GENERAL PROGRAM STATEMENT**

The Public Archives and Research Library holds a large collection of material relating to the history of Idaho and the Pacific Northwest. The collection is extremely varied in subject, geographic area,

and time period. It includes both historical and genealogical information and covers a wide variety of mediums, including manuscript and state archives material, microfilm, photographs and moving images, oral histories, maps, digital material and reference materials.

The Public Archives and Research Library is open to the public and serves some 15,000-16,000 on- and off-site researchers on an annual basis. Charged since 1947 with State Archives authority, the staff works closely with State, county, and municipal officials in providing long-term storage for records of permanent historical value and technical assistance on records management issues. The staff also provides general workshops on research methodology, preservation issues and other topics for the public.

### **Enhance ISHS strategic development**

- Provide leadership and support to “Training” “Funding and Growth” “Customer Service” and “Internal Communications” teams and implement prioritized recommendations including 4 training sessions annually, assessment of AASLH/related surveys, membership development, and enhanced communication measures
- Provide leadership and support to Agency Directives
- Provide resources as requested to advance agency priorities

### **MAJOR GOALS AND OBJECTIVES**

Execute Capitol Restoration work plan for the purpose of completing the project by the end of the fiscal year:

- Curate, produce and install photography for Capitol committee and caucus rooms
- Plan for the acquisition and cataloguing of plans, photography and other materials produced for the Capitol Restoration program and create archive of this material for public access
- Provide, free of charge, a meeting room for both the monthly Capitol Commission and the quarterly Art, History and Culture committee meetings, as requested;
- Develop and post to the ISHS website an exhibit pertaining to the Capitol oral history project;
- Conduct additional oral history interviews to complement the existing Capitol oral history project;
- Continue to provide courier service for the State agencies displaced by the Capitol project that have placed permanent records in our custody;
- Assist with permanent exhibit project;
- Oversee restoration of historic furniture, including cataloging of same;
- Assist with development of education programs;
- Accept, in conjunction with the Historical Museum, donation of, and catalog, historic tree items;
- Wrap up the project, maximizing the services of the limited service positions and consolidating off-site storage areas.

Complete purchase and installation of compact/mobile shelving for the purpose of increasing storage efficiency

- Coordinate with DPW and contractor to ensure timely completion of project;
- Supervise on-site work of contractors and subcontractors;

- Ensure on-going access to collection materials;
- Update location information in collections database.

Assess the viability of and implement program(s) with private sector partnerships to enhance access to and revenue produced from PARL collections for the purpose of generating substantial new dedicated funds for the Agency.

- Research potential vendors, including Corbis, Contextual connections, LLC, etc., determine viability of partnership potential and implement accordingly

Complete analysis and make recommendation re: merger of Public Archives and Records Center functions:

- Complete business plan;
- Survey various stakeholders for input;
- Prepare legislation for consideration by FY11 Idaho Legislature.

Increase on-line collection content and resources to allow easy access to information for the public:

- Continue membership in Northwest Digital Archives/Orbis-Cascade Alliance;
- Continue participation in Library of Congress/Washington State Archives grant project to contribute electronic data to the Idaho Digital Archives;
- Contribute to agency efforts to update/revamp the ISHS website;
- Replace Rediscovery as PARL's collections management database.

Increase other outreach efforts:

- Implement recommendations of "Outreach Plan for Public Archives and Research Library," including activities targeted toward PARL's governmental clientele and family history communities.

Complete various grant-funded activities:

- SHRAB SNAP grant;
- NEH/PAG oral history consultant, if funded;
- Explore additional grant opportunities in accordance with budget principles.

Continue a long-range planning exercise for PARL to align with ISHS strategic plan:

- Assess current PARL goals, products and services;
- Assess needs of the public in relation to those goals, products and services;
- Develop plan to maximize efficiency in delivered products and services to the public and other stakeholders.

Develop digital collection and preservation strategy:

- Identify digital files having permanent, historical value;
- Acquire knowledge and skills in handling digital files, whether by staff training, use of consultants or partnering with others;
- Re-organize digital files on servers to ensure long-term preservation.

Conduct Special Olympics oral history project, in coordination with Historical Museum (which has accessioned a collection of 2009 Special Olympics artifacts)

- Interview 5-10 people involved with various aspects of Special Olympics, including planners, athletes, venue managers, trainers/coaches/teachers, and host families.

## ADMINISTRATION AND FINANCE

*FY 2010 goals*

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## IDAHO STATE HISTORICAL SOCIETY

### GENERAL PROGRAM STATEMENT

The Administration and Fiscal section of the Idaho State Historical Society provides leadership in resource development, allocation, and management to support the mission of the agency. The office oversees and is responsible for assuring compliance with statewide fiscal policies, relevant sections of Idaho Code, and other authoritative state memoranda and documentation. The office seeks enhancement of the agency's budget and service delivery through cost benefit review and through achieving new resources to complement the agency's state appropriation. Also provided by the office are centralized information technology services, including desktop support, coordinated hardware and software purchasing, and website development. The office is also responsible for the comprehensive marketing and promotion of the agency's programs to enhance public awareness and use of its programs and services. The office of the State Historian and Capitol Preservation program are also key functions of this department.

### MAJOR GOALS AND OBJECTIVES

#### Enhance ISHS strategic development

- Provide leadership and support to "Training" "Funding and Growth" "Customer Service" and "Internal Communications" teams and implement prioritized recommendations including 4 training sessions annually, assessment of AASLH/related surveys, funding plan, and enhanced communication measures
- Provide leadership and support to Agency Directives
- Provide resources as requested to advance agency priorities

#### **1. Obtain funding, based upon the approved fund development plan, for the purpose of supporting agency programs and services**

##### Ongoing

- Establish budget principles and agency priorities with leadership team in April
- Determine budget line items to be requested by June 1
- Present budget for Trustee approval in June
- Submit appropriations request as required by statute on September 1<sup>st</sup> of each fiscal year.
- Create and implement indirect cost plan policy to recover indirect cost of support to grant funded activities

##### FY 2010 Initiatives

- Implement prioritized grant calendar and proposal submittals to those activities that help to: 1.) replace funds depleted during the FY 2009/2010 budget reduction process; 2.) enhance and promote public programs and exhibitions that will increase attendance/sponsorship/earned income; and 3.) to complete project in process
- Implement 4 membership acquisition efforts and 1 annual fund campaign
- Produce, evaluate and template 4 fundraising events in partnership with the Foundation for Idaho History

- Negotiate five year fixed rate for indirect cost plan
- With MOP SHPO, and PARL, enhance earned income (fees for services, retail, rentals) through cost benefit analysis of major fee sources and program expenditures, increasing fees, and assessment of private sector partnerships for commercial use of collections and facilities
- Create earned income reinvestment plan to maximize interest income on reserve accounts
- Plan and implement capital campaign cultivation strategy for the museum expansion; set new timeframe for program reinstatement based upon economic indicators, dialog with the Governor, and alignment with fund development goals
- Cultivate area foundation staff and potential donors through two visits per month
- Integrate fund development plan with fiscal cycle

2. **Increase marketing, media and public relations efforts for ISHS to advance and promote our mission, public programs and exhibitions to increase attendance/sponsorship/earned income and engage broader audiences**

Ongoing

- Build on current marketing efforts and work with “Funding and Organizational Development” team to continue to advance marketing and awareness of agency
- Align work-group level marketing efforts through an annual media calendar
- Use results of AASLH customer service survey and recommendations of Customer Service Committee to refine products and services to increase their relevance to our customers and community(ies)
- Facilitate relationships with aligned partners for low or no-cost promotional support

FY 2010 initiative

- Contract with outside counsel to create an agency-wide strategic communications and marketing plan that will serve as a roadmap for communications, “branding”, marketing and public relations work. Plan and tactics will be designed for execution by internal staff and professional communications firm.

3. **Provide executive services to ISHS Board of Trustees for the purpose of enhancing decision making and governance**

Ongoing

- Manage regular and special board meetings for efficient and effective conduct of Agency business; provide strategic interface between the board and Governor
- Recommend policies that will facilitate the Board’s role in fulfilling the mission of the Society
- Present reports that will assist in the Board’s evaluation of the performance of the Society
- Implement the Society’s long range plan and annual plan through appropriate professional practice
- Ensure the legal and ethical responsibilities of the agency are being fulfilled

FY 2010 Initiative

- Engage the trustees in fundraising efforts; facilitate liaison between the Trustees and Foundation for Idaho History;

- Implement legislative program and maintain governor liaison meetings
- Plan and implement a strategic plan retreat (September 2009) with planning committee members, leadership team, and trustees to evaluate strategic plan and revise for the July 2010 submittal.

**4. Continue outreach efforts for the purpose of engaging the ISHS statewide audience, partners, and stakeholders**

Ongoing

- Provide professional assistance to partner organizations (museums, historical societies, etc.) as requested and time and funding permit
- Take advantage of all scheduled travel opportunities to visit partner organizations
- Enhance coordination and promotion of Agency Grant Programs including CLG's, SHRAB, and Community Enhancement Grant
- Provide liaison to Governor's Lewis and Clark Trail Committee and American David Thompson Bicentennial planning Commission

FY2010 Initiative

- Provide leadership and direction for the Capitol Commission, in order to complete the workplan and this extraordinary project.
- Implement Agency publications plan including production of: two Mountain Light newsletters (Spring and Fall), 6 histor-e electronic newsletter (bi-monthly), Annual Report, two Idaho Landscapes in collaboration with ISU and BSU (semiannually), and other publications as funding allows.
- Host 3 Community Forums (Salmon in July, Pocatello, North Idaho or Sun Valley for others)
- Research opportunities and design for a statewide affiliate program
- Manage and promote Heritage City, Century Farm, and Esto Perpetua Awards Programs.

**5. Manage governmental relations program for the purpose of building the relevance of and cultivating support for the programs of the ISHS.**

- Coordinate regular communication with elected officials (governor, legislators, and congressional delegation) including history-e newsletters, *Idaho Landscapes*, posters, and Annual Report (not all publications need to go to every elected official).
- Coordinate annual legislative reception
- Regular visits with elected officials, including at least one visit to delegation in D.C.
- Present Society progress update to Senate and House Education Committees, as requested
- Coordinate meetings of Trustees with Governor and/or his staff during each Trustee meeting held in Boise
- Insure that all stakeholders receive personal invitation to:
  - Annual meeting/Esto Perpetua presentation
  - Community forums

To speak at exhibit openings, special programs, and Heritage City/  
Century Farm presentations

6. **Support the management of agency resources for the purpose of efficient and effective operations**

Ongoing

▪ Manage agency assets

Prepare reports for Risk Management to carry adequate insurance on agency-owned fixed assets and inventory

Manage agency fleet to maximize efficiency of use

Support safeguarding of agency-owned assets including:

Cash management through new internal control training and new-hire orientation

Facilities, through updating insurance protocols and timely maintenance

Vehicles, according to the fleet management policy

▪ Manage agency budget

Ongoing

Present reports that will assist in the Board of Trustee's evaluation of the performance of the Society

Set up line item budgets and revenue programs for each workgroup and support managerial control

Prepare monthly financial reports and analyses as needed

FY2010 Initiative

Analyze purchasing processes to maximize cost-effectiveness, ensure compliance, and minimize redundancies

Fully utilize capabilities of State Controller's on-line applications to increase efficiency and enhance internal controls

▪ Manage revenue stream

Prepare and deposit receipts daily

Prepare invoices and manage accounts receivables

Manage license agreements

▪ Manage grants

Ongoing

Ensure compliance with financial grant requirements

Manage grants fiscal operations and establish financial controls and systems for new grants and future audits

Compile and analyze project, grant, and financial data to develop budgets for grant applications.

Analyze grant budgets to funding forecasting and make recommendations for corrections or budget transfers when needed

Establish and maintain grant files and provide financial reporting to managers  
Maintain grant numbers on STARS  
Obtain DFM appropriation approval  
Maintain a good working relationship with DPW on grant related capital projects

FY2010 Initiative

Closeout 95% of the historically challenging grants at the end of the FFY 2009  
Establish protocols for the proper management of the Save America's Treasures grant

- Manage accounting systems

Ongoing

Update accounting structure in STARS as needed to track agency revenue and expenditures  
Update Position Control in IPOPS as needed to maintain alignment of personnel costs with available appropriation  
Update PCard application to allow for use of PCards by agency personnel  
Update and maintain access to applications and systems as needed and appropriate for users of the State Controller's accounting systems

Coordinate and prepare as necessary schedules for completion of the statewide Comprehensive Annual Financial Report (CAFR).

Maintain accounting structure in STARS as needed to track agency revenue and expenditures  
Maintain and Update Position Control in IPOPS as needed to maintain alignment of personnel costs with available appropriation  
Maintain application to allow for use of PCards by agency personnel  
Update and maintain access to applications and systems as needed and appropriate for users of the State Controller's accounting systems  
Coordinate and prepare as necessary schedules for completion of the statewide Comprehensive Annual Financial Report (CAFR).

FY2010 Initiative

Fully utilize capabilities of State Controller's on-line applications to increase efficiency and enhance internal controls through implementation of payment services

Write and recommend new fiscal policies for:

Internal Controls  
Cash Management  
Purchasing

Determine how to address COOP and Disaster Plan EO 2006-10

7. **Support the selection and retention of the highest quality workforce attainable by providing quality human resource services with integrity, objectivity, responsiveness, sensitivity and confidentiality to the employee of ISHS.**

- Provide and enhance recruitment and selection services
  - Insure hiring policies and procedures are implemented
  - Provide direction for announcement creations, interview questions and weight matrices
  - Insure pay equity across agency
  - Insure that job offer correspondence is done in a timely and accurate manner
- Provide training and professional development services
  - Complete new hire orientation with in 30 day of hiring
  - Partner with the strategic training team to deliver training opportunities quarterly
  - Plan and implement annual meeting
  - Update policy and procedure manual annually
- Provide performance management services
  - Purchase new evaluation program
  - Implement CEC and recognition programs
  - Review evaluations for equality
- Provide labor and employee relations services
  - Ensure compliance with all rules and regulations according to all federal and state employment laws
  - Ensure all confidentiality of all personal records
  - Ensure accurate processing of IPOPS, personnel and payroll processing transactions
  - Counsel internal 'customers' in relation to problems at work
  - Analyze human resources and related processes to maximize cost effectiveness, compliance and minimize redundancies.
  - Work with leadership team to help develop staff job descriptions and analyze opportunities needed for reclassifications of positions.

8. **Provide Technology Services to ISHS work groups for the purpose of enhancing and providing cost-effective internal and external electronic communications.**

Ongoing

- Provide computer software, hardware, and peripheral support to Society staff and volunteers.
- Coordinate purchasing of Society's hardware, software, and computer peripheral devices.
- Assist staff in planning and implementing new projects that include technological components.

### FY 2010 Initiative

- Add new collections data to website.
- Using state-approved design template and input from ISHS staff, lead staff in reorganization of website. Add Web 2.0 components to site as allowed by state policy.
- Install servers at Museum and Assay Office; install and tape library backup systems at Museum, Assay Office, and Idaho History Center.