



**Idaho State Historical Society  
Strategic Plan  
FY 2010-2015**

***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, sharing, and using history and cultural resources relevant to today to inform and influence the future.

***Values***

**Customer Service**

- *ISHS serves the historical needs of the entire state of Idaho*
- *ISHS directly supports State, Tribal, City, and County governments*
- *ISHS directly supports immediate information needs of the public*
- *ISHS directly supports teachers, students, families, tourists, and researchers*
- *ISHS responds to the needs of its customers through purposeful program development and assessment*

**Stewardship**

- *ISHS collects, preserves, and provides access to archeological and historical artifacts and archival materials*
- *ISHS represents a statewide and national perspective and process that increases stewardship of historic buildings and sites*
- *ISHS sustains multiple sites and purposes in its work*

**Education**

- *ISHS teaches essential historical literacy and promotes learning and a historical/research process through public programs*
- *ISHS models an artifact/archival approach to ideas about people, places, and events*
- *ISHS uses a participant focus in program development*

**Professionalism**

- *ISHS is committed to making history a living resource for the people of Idaho through traditional programming and those that serve social needs*

- *ISHS is committed to implementing the highest professional practices possible in alignment with national state and local standards established by professional organizations including:*

Society of American Archivists/Council of State Archivists  
 American Association of Museums  
 National Historic Preservation Act  
 American Library Association  
 American Association for State and Local History  
 Secretary of Interior Standards for Treatment of Historic Properties  
 Government Accounting Principles  
 Governmental Accounting Standards Board  
 Association of Fundraising Professionals

### ***Case for Support***

Created in 1881 and established as a state agency in 1907, the Idaho State Historical Society (ISHS) strategically deploys historic resources to benefit Idahoans through essential services including records management and dynamic public programs in education, preservation and stewardship, and technical assistance.

The Idaho State Historical Society is not fully supported with state funds, we raise about half our budget to support services and programs with a mix of fees, public and private grants, membership, corporations and philanthropic gifts.

The Idaho State Historical Society serves over 100,000 people each year through educational programs, tours and events, research use, and technical assistance. Annually, over 15,000 school- aged children benefit from ISHS programs and visits.

### ***Agency Brand***

The ISHS must transform itself. We must think, act, and develop a “fan base” and revenue streams like a consumer brand or nimble non-profit. In order to meet our revenue goals and optimize public awareness and participation in agency services through enhanced brand identity, web-site, marketing and outreach, ISHS will:

### **Market to target audiences:**

- *The Inner Circle:* Those who are already exposed to, and appreciative of, history and all or parts of what the ISHS has to offer. Includes existing members and seasoned researchers.
- *The Potentials:* People with a propensity to want to seek historical experience and education for either themselves (includes sharing it with visitors or guests) or their families. Includes Idaho residents entertaining visitors, families with children, students on school trips, younger researchers, casual researchers and the curious.
- *Key Influencers:* Lawmakers and civic leaders.

**Use key attributes and target audiences as a cornerstone of ISHS branding and marketing strategy:**

*Organizational Attributes*

- Credible
- Passionate
- Trusted
- Responsive
- Wide-reaching
- Easy to work with

*Brand Promise*

- Dynamic
- Fun
- Genuine
- Accessible
- Gratifying
- Deep

**Develop marketing plans to reach key target audiences and meet revenue goals:** Based upon the revenue enhancement plans created by ISHS, the focus of the marketing plans will be on attendance and membership, special events and venue rentals. The plans will provide clearer focus, organization and division of responsibilities, and outcomes based measurement.

**Positioning Statement:**

The Idaho State Historical Society illuminates our state's future and helps people of all ages explore and appreciate Idaho's rich past and learn more about themselves.

**Key Messages:**

- The Idaho State Historical Society offers services that are essential to the state on all levels, providing information and understanding to everyone from schoolchildren to members of the upper echelon of state government.
- The Idaho State Historical Society is a trusted guide through the state's history and how it has shaped every aspect of our lives — our land, our communities, our government and our people — while also illuminating how history sheds light on the future.
- The Idaho State Historical Society is an active member of the state that engages community by building on shared experiences and inspires further action and understanding.

- The Idaho State Historical Society uses its resources to provide a window to the past for people of all ages, leading to a shared vision for the future.

### **Strategic Plan Goal 1**

***Education and Customer Service: Provides statewide essential and dynamic services in a customer valued manner.***

#### *Objectives(s):*

- A) Enhance Agency understanding of the needs of current and future customers

#### Strategies:

Implement a formal customer service survey every three years

- B) Create and assess purposeful educational programs and services

#### Strategies:

- Design programs that respond to target audience needs
- Assess 100% of new programs for agency, social, and learning outcomes/impact according to Agency logic model template(s) as appropriate
- Phase in impact assessment for existing programs based upon annual available resources
- Seek opportunities to advance Agency mission through affiliation with national programs:
  - AASLH and related awards programs
  - National History Day

- C) Articulate and achieve statutory requirements

- a. Enhance Agency's statewide value through bringing new resources to the state of Idaho

#### Strategies:

- Expand statewide re-granting programs including:
  - State Historic Records Advisory Board
  - Certified Local Government grants
  - Community Enhancement grants
- Continue professional best practice technical assistance to rural, city, and county entities:
  - Museums
  - Libraries
  - Non-profits
  - Local Government

Measures:

- # of programs delivered to target audience(s)
- % of programs delivered where Impact measurement(s) demonstrate high level of value
- Meet statutory requirements and deadlines 100% of the time

**Strategic Plan Goal 2**

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

*Objectives(s):*

- A) Enhance Agency programs through non-state sources

Strategies:

- Increase earned income from fees and services in accordance with revenue enhancement tactics
- Increase philanthropic support through 7 annual fundraising events in conjunction with the Foundation for Idaho History (2 evening house parties, 4 business breakfasts, and *Adopt an Artifact Gala*)
- Increase ISHS membership and income through inspiring and meaningful programs, quarterly renewal mailing and 1 annual appeal
- Optimize annual grant plan success through aligning high priority programs with funders
- Develop private sector partnerships to leverage rental potential of Agency sites and commercial use of collections
- Secure funding for Idaho State Archives through filing fee
- Optimize indirect overhead cost recovery on all federal grants

Measure(s):

- % sustainable annual revenue increase
- % increase in stakeholder participation
- # of positive stakeholder testimonials

- B) Support essential services and state assets through state of Idaho sources

Strategies:

- Demonstrate value of services through visitor/customer impact measures
- Propose programs that respond to Idaho social needs
- Identify and prioritize deferred maintenance needs
- Identify and prioritize collections management needs

Measures:

% of requests funded

Amount of request funded

Executive and legislative branches understand the value of essential services and state assets

C) Foster partnerships for program support and Agency advocacy

Strategies:

- Maintain regular communication with partners across agency
- Create a master agency-wide database of partners

Measure(s):

# of partner joint activities completed

# of partners using ISHS material and staff resources

Partners reference ISHS resources to their constituents

Amount of financial contributions from partners

**Strategic Plan Goal 3**

***Marketing and Communications: Optimize public awareness and participation in agency services through enhanced brand identity, web-site, marketing and outreach.***

*Objective(s):*

A) Implement Agency Brand

Strategies:

- Involve Agency in brand development
- Develop and approve brand guidelines
- Redesign agency collateral and related materials
- Train staff to deliver on brand promise

Measure(s):

Agency graphics and external communication meet brand guidelines 100% of the time

Staff understands and delivers on brand promise 100% of the time

B) Redesign Agency Web site

Strategies:

- Create a brand-aligned web site that drives potential visitors and users to the site
- Aligns Agency with State required template

Measure(s):

Visitor exit surveys cite web as reason for attending  
# online memberships increase  
# of visits to website increases (Google metrics or other program used to measure)

C) Enhance public awareness and increase usage through tactical marketing plans.

Strategies:

- Implement tactical marketing plans including attendance, rental, and events/membership based upon annual plan priorities
- Utilize event plan templates
- Utilize poster, postcard, and flier templates

Measure(s):

Increased number of visitors at the Museum, Old Pen, and State Archives

Measure and report % achievement in attendance goal

Measure and report % achievement of revenue goal

Measure and report on impact assessment

Increased number of venue rentals at the Museum, Old Pen, and History Center

**Strategic Plan Goal 4**

***Training and organizational development: Provide professional development necessary to achieve the Agency's strategic plan and vision.***

*Objective(s):*

A) Assess human resource skill/ allocation needs based upon external environmental factors and develop human resource recruitment and succession plan to optimize Agency long-term performance

Strategies:

- Assess and recruit for specific skills sets for staff, board, foundation and volunteers

B) Creates and implements new hire orientations

Strategies:

- Each new employee oriented within one week.

Measure(s):

100% attendance and participation

C) Implements professional development for trustees, agency leadership and department staff

Strategies:

- Provide strategic training opportunities for individuals based on annual plan, agency need, individual goals and work group resources.
- Produce for the board an executive summary governance document to facilitate effective decision making

Measure(s):

100% attendance and participation  
Outline document completed

D) Determine training types and priority of staff professional development

Strategies:

- Creates and implements annual schedule of all-staff required training

Measure(s):

100% attendance and participation