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Agency Summary And Certification

522 -- Historical Society, State

Original Submission ____ or Rev No. ____

FY2018 Request

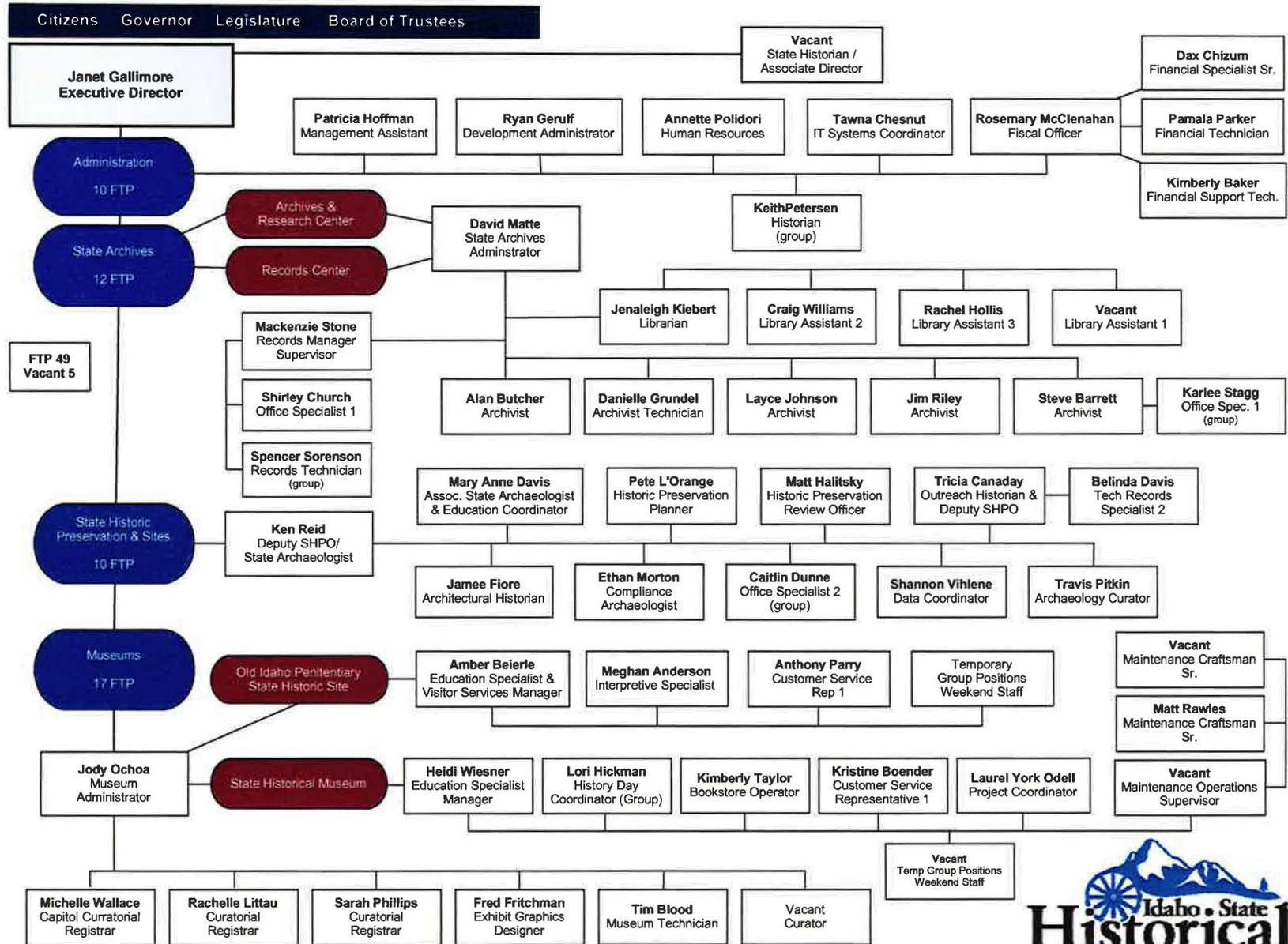
Page ____ of ____ Pages

In accordance with 67-3503, Idaho Code, I certify the attached forms properly state the receipts and expenditures of the department (agency, office, or institution) for the fiscal years indicated. The summary of expenditures by major program, fund source, and standard class is indicated below.

Signature of Department Director :

Date: November 18, 2016

Function/Activity	FY 2016 Total Appropriation	FY 2016 Total Expenditures	FY 2017 Original Appropriation	FY 2017 Estimated Expenditures	FY 2018 Total Request
Historical Preservation & Education	5,892,900	4,465,900	14,253,000	14,253,000	8,167,600
Total	5,892,900	4,465,900	14,253,000	14,253,000	8,167,600
By Fund Source	Total Appropriation	Actual Expenditures	Original Appropriation	Estimated Expenditures	Total Request
G 0001-00 General Revenue Fund	2,775,900	2,775,900	2,776,800	2,776,800	4,076,600
D 0150-01 Economic Recovery Reserve Fund	0	0	4,246,100	4,246,100	0
D 0481-09 Capitol Commission Operating Fund	117,300	104,300	121,800	121,800	121,500
F 0348-00 Federal Grant	1,415,200	850,600	1,564,200	1,564,200	2,362,300
O 0349-00 Miscellaneous Revenue	1,336,900	498,400	5,237,200	5,237,200	1,296,600
O 0349-41 ID Historic Preservation & Cultural Enhancement	0	0	50,000	50,000	0
O 0450-75 Records Management Services Fund	247,600	236,700	256,900	256,900	310,600
Total	5,892,900	4,465,900	14,253,000	14,253,000	8,167,600
By Object	Total Appropriation	Actual Expenditures	Original Appropriation	Estimated Expenditures	Total Request
Personnel Costs	3,443,700	2,737,600	3,573,000	3,573,000	4,007,300
Operating Expenditures	2,176,500	1,467,900	10,302,200	10,302,200	3,729,500
Capital Outlay	111,100	132,100	216,200	216,200	269,200
Trustee And Benefit Payments	161,600	128,300	161,600	161,600	161,600
Lump Sum	0	0	0	0	0
Total	5,892,900	4,465,900	14,253,000	14,253,000	8,167,600
FTP Total	49.02	49.02	49.00	49.00	58.00



FY 2018 Agency Budget - Request**Line Item Report****Agency: 522 Historical Society, State**

Decision Unit	Priority	Agency Request		
		FTP	General	Total
Historical Preservation & Education				
12.01 State Museum Expansion and Renovation	1	8.00	1,220,700	1,277,100
12.02 State Records Center	2	1.00	0	50,000
12.03 Spending Authority for Federal Grants	0	0.00	0	800,000
		9.00	1,220,700	2,127,100

FORM B11: REVENUE

Agency/Department: Idaho State Historical Society
 Program (if applicable): _____

Request for Fiscal Year: 2018
 Agency Number: 522
 Budget Unit (if Applicable): EDMA/EDMB/EDMD
 Function/Activity Number (if Applicable): 1

Original Request Date: 9/1/16 Revision Request Date: _____

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Fund No.	Fund Detail No.	Fund Name	Significant Assumption Number	Summary Object Code	Revenue Source Description -Summary Level	FY 2014 Actual Revenue	FY 2015 Actual Revenue	FY 2016 Actual Revenue	FY 2017 Estimated Revenue	FY 2018 Estimated Revenue
0348		Federal Grant		1501	Sale of Services	95,400	82,500	78,100	110,000	100,000
				1701	Sale of Goods	7,400	7,900	8,200	10,000	20,000
			1	2001	Contributions	602,200	714,300	777,000	1,350,000	1,650,000
				3601	Miscellaneous Revenue	100	1,100	0	200	800
0348		Federal Grant			FUND TOTAL	\$705,100	\$805,800	\$863,300	\$1,470,200	\$1,770,800
0349	NA	Miscellaneous Revenue								
0349	16	(EDMA)		1001	License/Permits/Fees	300,500	261,100	316,600	350,000	350,000
			2	1501	Sale of Services	72,000	27,200	25,300	30,000	32,000
			2	1701	Sale of Goods	109,900	80,000	84,800	90,000	95,000
				2101	State Grants, Contributions	12,800	0	0		
				2501	Interest Earned - Pooled	4,300	(3,000)	8,100	7,800	8,000
				2701	Rent and Lease Income	121,800	125,500	118,900	140,000	145,000
			2	3601	Miscellaneous Revenue	94,900	74,900	160,600	2,000,000	2,500,000
0349	41	Id Historic Preservation and Cultural Enhancement Fund	3	2501	Interest Earned	100	(100)	200	200	0
0349	NA	Miscellaneous Revenue			FUND TOTAL	\$716,300	\$565,600	\$714,500	\$2,618,000	\$3,130,000
0450	75	Records Management Services		1701	Sale of Goods	213,900	219,500	244,500	256,900	310,000
0450	75	Records Management Services			FUND TOTAL	\$213,900	\$219,500	\$244,500	\$256,900	\$310,000
0481	09	Capitol Commission Operating		3601	Miscellaneous Revenue	2,350	0	0	0	0
0481	09	Capitol Commission Operating			FUND TOTAL	\$2,350	\$0	\$0	\$0	\$0
					FUND TOTAL	\$0	\$0	\$0	\$0	\$0

FORM B12: ANALYSIS OF FUND BALANCES

Request for Fiscal Year : 2018

Agency/Department: Idaho State Historical Society

Agency Number: 522

Original Request Date: September 1, 2016 or Revision Request Date: _____

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Sources and Uses: _____

FUND NAME:	Federal Grant Fund	FUND CODE:	0348	FY 2014 Actual	FY 2015 Actual	FY 2016 Actual	FY 2017 Estimate	FY 2018 Estimate
1. Beginning Free Fund Balance				400,200	293,600	230,000	242,200	498,200
2. Encumbrances as of July 1				0	0	2,000	0	0
2a. Reappropriation (Legislative Carryover)				NA	NA	NA	0	0
3. Beginning Cash Balance				400,200	293,600	232,000	242,200	498,200
4. Revenues (from Form B-11)				705,100	805,800	863,300	1,470,200	1,770,800
5. Non-Revenue Receipts and Other Adjustments				(600)	900	(1,600)	0	0
6. Statutory Transfers in: Federal Grant Fund		Fund or Reference:	0348	116,200	0	0	0	0
7. Operating Transfers in:		Fund or Reference:		0	0	0	0	0
8. Total Available for Year				1,220,900	1,100,300	1,093,700	1,712,400	2,269,000
9. Statutory Transfers Out: Miscellaneous Revenue Fund		Fund or Reference:	0349	155,000	0	0	0	0
10. Operating Transfers Out: Federal Grant Fund		Fund or Reference:	0348	116,200	0	0	0	0
11. Non-Expenditure Disbursements and Other Adjustments				300	0	(100)	0	0
12. Cash Expenditures for Prior Year Encumbrances				0	0	1,000	0	0
13. Original Appropriation				1,494,500	1,495,600	1,415,200	1,564,200	2,112,300
14. Prior Year Reappropriations, Supplementals, Rescissions				0	0	0	0	0
15. Non-cogs, Receipts to Appropriation, etc				0	0	0	0	0
16. Reversions				(838,700)	(625,300)	(564,600)	(350,000)	0
17. Current Year Reappropriation				0	0	0	0	0
18. Reserve for Current Year Encumbrances				0	(2,000)	0	0	0
19. Current Year Cash Expenditures				655,800	868,300	850,600	1,214,200	2,112,300
20. Ending Cash Balance				293,600	232,000	242,200	498,200	156,700
21. Prior Year Encumbrances as of June 30				0	0	0	0	0
22. Current Year Encumbrances as of June 30				0	2,000	0	0	0
22a. Current Year Reappropriation				NA	NA	0	0	0
23. Borrowing Limit				0	0	0	0	0
24. Ending Free Fund Balance				293,600	230,000	242,200	498,200	156,700
25. Budgetary Basis Expenditures (CY Cash Exp + CY Enc)				655,800	870,300	850,600	1,214,200	2,112,300
26. Outstanding Loans (if this fund is part of a loan program)								

Notes:

FY14 transfer in/out resulted form an indirect cost adjustment

FORM B12: ANALYSIS OF FUND BALANCES

Request for Fiscal Year : 2018

Agency/Department: Idaho State Historical Society

Agency Number: 522

Original Request Date: September 1, 2016 or Revision Request Date: _____

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Sources and Uses:

FUND NAME:	Miscellaneous Revenue Fund	FUND CODE:	0349	FY 2014 Actual	FY 2015 Actual	FY 2016 Actual	FY 2017 Estimate	FY 2018 Estimate
1. Beginning Free Fund Balance				1,539,800	1,608,300	1,532,500	2,043,100	1,443,900
2. Encumbrances as of July 1				90,200	165,000	275,700	0	0
2a. Reappropriation (Legislative Carryover)					NA	NA	0	0
3. Beginning Cash Balance				1,630,000	1,773,300	1,808,200	2,043,100	1,443,900
4. Revenues (from Form B-11)				716,200	565,600	714,300	2,618,000	3,130,000
5. Non-Revenue Receipts and Other Adjustments				7,000	4,400	3,700	2,000	
6. Statutory Transfers in: Federal Grant Fund		Fund or Reference:	0348	155,000	0	0	0	0
7. Operating Transfers in: L&C License Plates		Fund or Reference:	ITD	21,700	23,200	21,900	22,000	22,000
8. Total Available for Year				2,529,900	2,366,500	2,548,100	4,685,100	4,595,900
9. Statutory Transfers Out:		Fund or Reference:		0	0	0	0	0
10. Operating Transfers Out:		Fund or Reference:		0	0	0	0	0
11. Non-Expenditure Disbursements and Other Adjustments				8,100	3,500	5,600	4,000	0
12. Cash Expenditures for Prior Year Encumbrances				90,200	28,100	1,000	0	0
13. Original Appropriation				1,324,400	1,190,200	1,336,900	5,237,200	4,296,600
14. Prior Year Reappropriations, Supplementals, Rescissions				0	0	0	0	0
15. Non-cogs, Receipts to Appropriation, etc				0	0	0	0	0
16. Reversions				(501,100)	(503,500)	(838,500)	(2,000,000)	(850,000)
17. Current Year Reappropriation				0	0	0	0	0
18. Reserve for Current Year Encumbrances				(165,000)	(160,000)	0	0	0
19. Current Year Cash Expenditures				658,300	526,700	498,400	3,237,200	3,446,600
20. Ending Cash Balance				1,773,300	1,808,200	2,043,100	1,443,900	1,149,300
21. Prior Year Encumbrances as of June 30				0	115,700	0	0	0
22. Current Year Encumbrances as of June 30				165,000	160,000	0	0	0
22a. Current Year Reappropriation				NA	NA	0	0	0
23. Borrowing Limit				0	0	0	0	0
24. Ending Free Fund Balance				1,608,300	1,532,500	2,043,100	1,443,900	1,149,300
25. Budgetary Basis Expenditures (CY Cash Exp + CY Enc)				823,300	686,700	498,400	3,237,200	3,446,600
26. Outstanding Loans (if this fund is part of a loan program)								

Notes:

This B12 does not include Fund 0349 41. Fund 0349 00 and 0349 16 are combined.

ISHS has \$4,000,000 appropriated in the Revenue Fund over a two-year period, FY17 and FY18. Revenue and expenditures for the Museum exhibits are estimated over the two-year period.

FORM B12: ANALYSIS OF FUND BALANCES

Request for Fiscal Year : 2018

Agency/Department: Idaho State Historical Society

Agency Number: 522

Original Request Date: September 1, 2016 or Revision Request Date: _____

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Sources and Uses: _____

FUND NAME:	Idaho Historic Preservation & Cultural Enhancement Fund	FUND CODE:	0349 41	FY 2014 Actual	FY 2015 Actual	FY 2016 Actual	FY 2017 Estimate	FY 2018 Estimate
1. Beginning Free Fund Balance				47,400	47,500	47,400	47,600	0
2. Encumbrances as of July 1				0	0	0	0	0
2a. Reappropriation (Legislative Carryover)				NA	NA	NA	0	0
3. Beginning Cash Balance				47,400	47,500	47,400	47,600	0
4. Revenues (from Form B-11)				100	(100)	200	200	0
5. Non-Revenue Receipts and Other Adjustments				0	0	0	0	0
6. Statutory Transfers in:	Fund or Reference:			0	0	0	0	0
7. Operating Transfers in:	Fund or Reference:			0	0	0	0	0
8. Total Available for Year				47,500	47,400	47,600	47,800	0
9. Statutory Transfers Out:	Fund or Reference:			0	0	0	0	0
10. Operating Transfers Out:	Fund or Reference:			0	0	0	0	0
11. Non-Expenditure Disbursements and Other Adjustments				0	0	0	0	0
12. Cash Expenditures for Prior Year Encumbrances				0	0	0	0	0
13. Original Appropriation				0	0	0	50,000	0
14. Prior Year Reappropriations, Supplementals, Rescissions				0	0	0	0	0
15. Non-cogs, Receipts to Appropriation, etc				0	0	0	0	0
16. Reversions				0	0	0	(2,200)	0
17. Current Year Reappropriation				0	0	0	0	0
18. Reserve for Current Year Encumbrances				0	0	0	0	0
19. Current Year Cash Expenditures				0	0	0	47,800	0
20. Ending Cash Balance				47,500	47,400	47,600	0	0
21. Prior Year Encumbrances as of June 30				0	0	0	0	0
22. Current Year Encumbrances as of June 30				0	0	0	0	0
22a. Current Year Reappropriation				NA	NA	0	0	0
23. Borrowing Limit				0	0	0	0	0
24. Ending Free Fund Balance				47,500	47,400	47,600	0	0
25. Budgetary Basis Expenditures (CY Cash Exp + CY Enc)				0	0	0	47,800	0
26. Outstanding Loans (if this fund is part of a loan program)								

Notes:

Fund 0349 41 - This fund did not have an appropriation prior to FY17. The fund balance will be expended per the one-time appropriation in FY17. The license plates have been discontinued so funding will no longer be available.

FORM B12: ANALYSIS OF FUND BALANCES

Request for Fiscal Year : 2018

Agency/Department: Idaho State Historical Society

Agency Number: 522

Original Request Date: September 1, 2016 or Revision Request Date: _____

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Sources and Uses: _____

FUND NAME:	Records Management Service Fund	FUND CODE:	0450 75	FY 2014 Actual	FY 2015 Actual	FY 2016 Actual	FY 2017 Estimate	FY 2018 Estimate
1. Beginning Free Fund Balance				8,782	4,729	15,589	22,832	22,832
2. Encumbrances as of July 1					0	0	0	0
2a. Reappropriation (Legislative Carryover)					NA	NA	0	0
3. Beginning Cash Balance				8,782	4,729	15,589	22,832	22,832
4. Revenues (from Form B-11)				213,916	219,534	244,471	256,900	310,000
5. Non-Revenue Receipts and Other Adjustments				1,355	1,651	(578)	0	0
6. Statutory Transfers in:	Fund or Reference:			0	0	0	0	0
7. Operating Transfers in:	Fund or Reference:			0	0	0	0	0
8. Total Available for Year				224,053	225,914	259,482	279,732	332,832
9. Statutory Transfers Out:	Fund or Reference:			0	0	0	0	0
10. Operating Transfers Out:	Fund or Reference:			0	0	0	0	0
11. Non-Expenditure Disbursements and Other Adjustments				0	600	0	0	0
12. Cash Expenditures for Prior Year Encumbrances				0	0	0	0	0
13. Original Appropriation				238,600	245,100	247,600	256,900	310,500
14. Prior Year Reappropriations, Supplementals, Rescissions				0	0	0	0	0
15. Non-cogs, Receipts to Appropriation, etc				0	0	0	0	0
16. Reversions				(19,276)	(35,375)	(10,950)	0	0
17. Current Year Reappropriation				0	0	0	0	0
18. Reserve for Current Year Encumbrances				0	0	0	0	0
19. Current Year Cash Expenditures				219,324	209,725	236,650	256,900	310,500
20. Ending Cash Balance				4,729	15,589	22,832	22,832	22,332
21. Prior Year Encumbrances as of June 30				0	0	0	0	0
22. Current Year Encumbrances as of June 30				0	0	0	0	0
22a. Current Year Reappropriation				NA	NA	0	0	0
23. Borrowing Limit				0	0	0	0	0
24. Ending Free Fund Balance				4,729	15,589	22,832	22,832	22,332
25. Budgetary Basis Expenditures (CY Cash Exp + CY Enc)				219,324	209,725	236,650	256,900	310,500
26. Outstanding Loans (if this fund is part of a loan program)								

Notes:
Line item request would increase spending authority by \$50,000; fees would be increased to reflect additional revenue.

FORM B12: ANALYSIS OF FUND BALANCES

Request for Fiscal Year : 2018

Agency/Department: Idaho State Historical Society

Agency Number: 522

Original Request Date: September 1, 2016 or Revision Request Date: _____

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Sources and Uses: _____

FUND NAME:	Capitol Commission Operating Fund	FUND CODE:	0481 09	FY 2014 Actual	FY 2015 Actual	FY 2016 Actual	FY 2017 Estimate	FY 2018 Estimate
1. Beginning Free Fund Balance				34,665	51,648	8,677	13,004	13,004
2. Encumbrances as of July 1					0	14,280	3,300	3,300
2a. Reappropriation (Legislative Carryover)					NA	NA	0	0
3. Beginning Cash Balance				34,665	51,648	22,957	16,304	16,304
4. Revenues (from Form B-11)				2,350	0	0	0	0
5. Non-Revenue Receipts and Other Adjustments				0	0	0	0	0
6. Statutory Transfers in:	Dept of Adm for Capitol Comm		Fund or Reference: HB293 - FY16	113,000	63,952	108,623	121,800	121,500
7. Operating Transfers in:			Fund or Reference:	0	0	0	0	0
8. Total Available for Year				150,015	115,600	131,580	138,104	137,804
9. Statutory Transfers Out:			Fund or Reference:	0	0	0	0	0
10. Operating Transfers Out:			Fund or Reference:	0	0	0	0	0
11. Non-Expenditure Disbursements and Other Adjustments				0	0	0	0	0
12. Cash Expenditures for Prior Year Encumbrances				0	0	14,280	0	0
13. Original Appropriation				113,000	115,600	117,300	121,800	121,500
14. Prior Year Reappropriations, Supplementals, Rescissions				0	0	0	0	0
15. Non-cogs, Receipts to Appropriation, etc				0	0	0	0	0
16. Reversions				(14,633)	(8,677)	(13,004)	0	0
17. Current Year Reappropriation				0	0	0	0	0
18. Reserve for Current Year Encumbrances				0	(14,280)	(3,300)	0	0
19. Current Year Cash Expenditures				98,367	92,643	100,996	121,800	121,500
20. Ending Cash Balance				51,648	22,957	16,304	16,304	16,304
21. Prior Year Encumbrances as of June 30				0	0	0	3,300	3,300
22. Current Year Encumbrances as of June 30				0	14,280	3,300	0	0
22a. Current Year Reappropriation				NA	NA	0	0	0
23. Borrowing Limit				0	0	0	0	0
24. Ending Free Fund Balance				51,648	8,677	13,004	13,004	13,004
25. Budgetary Basis Expenditures (CY Cash Exp + CY Enc)				98,367	106,923	104,296	121,800	121,500
26. Outstanding Loans (if this fund is part of a loan program)								

Notes: _____

FY 2018 Agency Budget - Request

Detail Report

Agency: 522 - Historical Society, State

Function: 01 - Historical Preservation & Education

		<u>FTP</u>	<u>Personnel Cost</u>	<u>Operating Expense</u>	<u>Capital Outlay</u>	<u>Trustee/ Benefit</u>	<u>Lump Sum</u>	<u>Total</u>
FY 2016 Total Appropriation								
1.00 FY 2016 Total Appropriation								
HB 293								
0001-00	General	25.72	1,698,300	934,900	111,100	31,600	0	2,775,900
0481-09	Dedicated	1.00	63,800	53,500	0	0	0	117,300
0348-00	Federal	11.90	901,200	384,000	0	130,000	0	1,415,200
0349-00	Other	8.40	671,800	665,100	0	0	0	1,336,900
0450-75	Other	2.00	108,600	139,000	0	0	0	247,600
	Total	49.02	3,443,700	2,176,500	111,100	161,600	0	5,892,900
1.21 Net Object Transfers								
0001-00	General	0.00	0	(7,900)	7,900	0	0	0
0481-09	Dedicated	0.00	(1,500)	(3,500)	5,000	0	0	0
0348-00	Federal	0.00	0	(6,000)	6,000	0	0	0
0349-00	Other	0.00	0	(23,500)	3,500	20,000	0	0
0450-75	Other	0.00	(900)	(1,000)	1,900	0	0	0
	Total	0.00	(2,400)	(41,900)	24,300	20,000	0	0
1.61 Reverted Appropriation Balances								
0481-09	Dedicated	0.00	(2,400)	(10,400)	(200)	0	0	(13,000)
0348-00	Federal	0.00	(305,900)	(213,600)	(2,000)	(43,100)	0	(564,600)
0349-00	Other	0.00	(393,800)	(433,600)	(900)	(10,200)	0	(838,500)
0450-75	Other	0.00	(1,600)	(9,100)	(200)	0	0	(10,900)
	Total	0.00	(703,700)	(666,700)	(3,300)	(53,300)	0	(1,427,000)
FY 2016 Actual Expenditures								
0001-00	General	25.72	1,698,300	927,000	119,000	31,600	0	2,775,900
0481-09	Dedicated	1.00	59,900	39,600	4,800	0	0	104,300
0348-00	Federal	11.90	595,300	164,400	4,000	86,900	0	850,600
0349-00	Other	8.40	278,000	208,000	2,600	9,800	0	498,400
0450-75	Other	2.00	106,100	128,900	1,700	0	0	236,700
	Total	49.02	2,737,600	1,467,900	132,100	128,300	0	4,465,900

FY 2018 Agency Budget - Request

Detail Report

Agency: 522 - Historical Society, State
Function: 01 - Historical Preservation & Education

		<u>FTP</u>	<u>Personnel Cost</u>	<u>Operating Expense</u>	<u>Capital Outlay</u>	<u>Trustee/ Benefit</u>	<u>Lump Sum</u>	<u>Total</u>	
FY 2017 Original Appropriation									
3.00 FY 2017 Original Appropriation									
SB 1407									
	0001-00	General	25.70	1,766,600	923,800	0	31,600	0	2,722,000
	OT 0001-00	General	0.00	54,800	0	0	0	0	54,800
	OT 0150-01	Dedicated	0.00	0	4,029,900	216,200	0	0	4,246,100
	0481-09	Dedicated	1.00	66,300	53,500	0	0	0	119,800
	OT 0481-09	Dedicated	0.00	2,000	0	0	0	0	2,000
	0348-00	Federal	11.90	935,100	476,500	0	130,000	0	1,541,600
	OT 0348-00	Federal	0.00	22,600	0	0	0	0	22,600
	0349-00	Other	8.40	596,900	627,200	0	0	0	1,224,100
	OT 0349-00	Other	0.00	13,100	4,000,000	0	0	0	4,013,100
	OT 0349-41	Other	0.00	0	50,000	0	0	0	50,000
	0450-75	Other	2.00	112,800	141,300	0	0	0	254,100
	OT 0450-75	Other	0.00	2,800	0	0	0	0	2,800
	Total		49.00	3,573,000	10,302,200	216,200	161,600	0	14,253,000

FY 2017 Total Appropriation

	0001-00	General	25.70	1,766,600	923,800	0	31,600	0	2,722,000
	OT 0001-00	General	0.00	54,800	0	0	0	0	54,800
	OT 0150-01	Dedicated	0.00	0	4,029,900	216,200	0	0	4,246,100
	0481-09	Dedicated	1.00	66,300	53,500	0	0	0	119,800
	OT 0481-09	Dedicated	0.00	2,000	0	0	0	0	2,000
	0348-00	Federal	11.90	935,100	476,500	0	130,000	0	1,541,600
	OT 0348-00	Federal	0.00	22,600	0	0	0	0	22,600
	0349-00	Other	8.40	596,900	627,200	0	0	0	1,224,100
	OT 0349-00	Other	0.00	13,100	4,000,000	0	0	0	4,013,100
	OT 0349-41	Other	0.00	0	50,000	0	0	0	50,000
	0450-75	Other	2.00	112,800	141,300	0	0	0	254,100
	OT 0450-75	Other	0.00	2,800	0	0	0	0	2,800
	Total		49.00	3,573,000	10,302,200	216,200	161,600	0	14,253,000

Expenditure Adjustments

6.31 FTP or Fund Adjustments

This request is for the FTP adjustment only.

	0001-00	General	0.10	0	0	0	0	0	0
	0348-00	Federal	-1.10	0	0	0	0	0	0
	0349-00	Other	1.00	0	0	0	0	0	0
	Total		0.00	0	0	0	0	0	0

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FY 2018 Agency Budget - Request

Detail Report

Agency: 522 - Historical Society, State
Function: 01 - Historical Preservation & Education

	FTP	Personnel Cost	Operating Expense	Capital Outlay	Trustee/Benefit	Lump Sum	Total
FY 2017 Estimated Expenditures							
0001-00 General	25.80	1,766,600	923,800	0	31,600	0	2,722,000
OT 0001-00 General	0.00	54,800	0	0	0	0	54,800
OT 0150-01 Dedicated	0.00	0	4,029,900	216,200	0	0	4,246,100
0481-09 Dedicated	1.00	66,300	53,500	0	0	0	119,800
OT 0481-09 Dedicated	0.00	2,000	0	0	0	0	2,000
0348-00 Federal	10.80	935,100	476,500	0	130,000	0	1,541,600
OT 0348-00 Federal	0.00	22,600	0	0	0	0	22,600
0349-00 Other	9.40	596,900	627,200	0	0	0	1,224,100
OT 0349-00 Other	0.00	13,100	4,000,000	0	0	0	4,013,100
OT 0349-41 Other	0.00	0	50,000	0	0	0	50,000
0450-75 Other	2.00	112,800	141,300	0	0	0	254,100
OT 0450-75 Other	0.00	2,800	0	0	0	0	2,800
Total	49.00	3,573,000	10,302,200	216,200	161,600	0	14,253,000
Base Adjustments							
8.41 Removal of One-Time Expenditures							
OT 0001-00 General	0.00	(54,800)	0	0	0	0	(54,800)
OT 0150-01 Dedicated	0.00	0	(29,900)	(216,200)	0	0	(246,100)
OT 0481-09 Dedicated	0.00	(2,000)	0	0	0	0	(2,000)
OT 0348-00 Federal	0.00	(22,600)	0	0	0	0	(22,600)
OT 0349-00 Other	0.00	(13,100)	0	0	0	0	(13,100)
OT 0349-41 Other	0.00	0	(50,000)	0	0	0	(50,000)
OT 0450-75 Other	0.00	(2,800)	0	0	0	0	(2,800)
Total	0.00	(95,300)	(79,900)	(216,200)	0	0	(391,400)
FY 2018 Base							
0001-00 General	25.80	1,766,600	923,800	0	31,600	0	2,722,000
OT 0001-00 General	0.00	0	0	0	0	0	0
OT 0150-01 Dedicated	0.00	0	4,000,000	0	0	0	4,000,000
0481-09 Dedicated	1.00	66,300	53,500	0	0	0	119,800
OT 0481-09 Dedicated	0.00	0	0	0	0	0	0
0348-00 Federal	10.80	935,100	476,500	0	130,000	0	1,541,600
OT 0348-00 Federal	0.00	0	0	0	0	0	0
0349-00 Other	9.40	596,900	627,200	0	0	0	1,224,100
OT 0349-00 Other	0.00	0	4,000,000	0	0	0	4,000,000
OT 0349-41 Other	0.00	0	0	0	0	0	0
0450-75 Other	2.00	112,800	141,300	0	0	0	254,100
OT 0450-75 Other	0.00	0	0	0	0	0	0
Total	49.00	3,477,700	10,222,300	0	161,600	0	13,861,600

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FY 2018 Agency Budget - Request

Detail Report

Agency: 522 - Historical Society, State
Function: 01 - Historical Preservation & Education

	FTP	Personnel Cost	Operating Expense	Capital Outlay	Trustee/Benefit	Lump Sum	Total
Program Maintenance							
10.11 Change in Health Benefit Costs							
0001-00 General	0.00	31,500	0	0	0	0	31,500
0481-09 Dedicated	0.00	1,200	0	0	0	0	1,200
0348-00 Federal	0.00	13,200	0	0	0	0	13,200
0349-00 Other	0.00	11,500	0	0	0	0	11,500
0450-75 Other	0.00	2,400	0	0	0	0	2,400
Total	0.00	59,800	0	0	0	0	59,800
10.12 Change in Variable Benefit Costs							
0001-00 General	0.00	(600)	0	0	0	0	(600)
0481-09 Dedicated	0.00	0	0	0	0	0	0
0348-00 Federal	0.00	(200)	0	0	0	0	(200)
0349-00 Other	0.00	(200)	0	0	0	0	(200)
0450-75 Other	0.00	0	0	0	0	0	0
Total	0.00	(1,000)	0	0	0	0	(1,000)
10.23 Contract Inflation							
Records Center storage contract increase.							
0450-75 Other	0.00	0	3,100	0	0	0	3,100
Total	0.00	0	3,100	0	0	0	3,100
10.31 Repair, Replacement Items/Alterations							
Replace three laptops, fifteen desktops, ten monitors; dispose of two older vehicles and replace them with one SUV- 4WD; replace security reception desk at History Center							
OT 0001-00 General	0.00	0	0	61,500	0	0	61,500
Total	0.00	0	0	61,500	0	0	61,500
10.61 Salary Multiplier - Regular Employees							
1% CEC							
0001-00 General	0.00	14,000	0	0	0	0	14,000
0481-09 Dedicated	0.00	500	0	0	0	0	500
0348-00 Federal	0.00	7,600	0	0	0	0	7,600
0349-00 Other	0.00	4,000	0	0	0	0	4,000
0450-75 Other	0.00	900	0	0	0	0	900
Total	0.00	27,000	0	0	0	0	27,000

FY 2018 Agency Budget - Request

Detail Report

Agency: 522 - Historical Society, State

Function: 01 - Historical Preservation & Education

	<u>FTP</u>	<u>Personnel Cost</u>	<u>Operating Expense</u>	<u>Capital Outlay</u>	<u>Trustee/Benefit</u>	<u>Lump Sum</u>	<u>Total</u>
10.62 Salary Multiplier - Group and Temporary							
1% CEC							
0001-00 General	0.00	400	0	0	0	0	400
0481-09 Dedicated	0.00	0	0	0	0	0	0
0348-00 Federal	0.00	100	0	0	0	0	100
0349-00 Other	0.00	800	0	0	0	0	800
0450-75 Other	0.00	100	0	0	0	0	100
Total	0.00	1,400	0	0	0	0	1,400

FY 2018 Total Maintenance

0001-00 General	25.80	1,811,900	923,800	0	31,600	0	2,767,300
OT 0001-00 General	0.00	0	0	61,500	0	0	61,500
OT 0150-01 Dedicated	0.00	0	4,000,000	0	0	0	4,000,000
0481-09 Dedicated	1.00	68,000	53,500	0	0	0	121,500
OT 0481-09 Dedicated	0.00	0	0	0	0	0	0
0348-00 Federal	10.80	955,800	476,500	0	130,000	0	1,562,300
OT 0348-00 Federal	0.00	0	0	0	0	0	0
0349-00 Other	9.40	613,000	627,200	0	0	0	1,240,200
OT 0349-00 Other	0.00	0	4,000,000	0	0	0	4,000,000
OT 0349-41 Other	0.00	0	0	0	0	0	0
0450-75 Other	2.00	116,200	144,400	0	0	0	260,600
OT 0450-75 Other	0.00	0	0	0	0	0	0
Total	49.00	3,564,900	10,225,400	61,500	161,600	0	14,013,400

Line Items

12.01 State Museum Expansion and Renovation

The Idaho State Historical Society and the State of Idaho are on the cusp of creating history, with the reopening of Idaho's State Historical Museum. Not since Governor Gooding recommended, and the 1907 Legislature approved the creation of the first State Museum, has such an epic effort been undertaken. This budget request includes funding to open and operate the new museum and realize the collective efforts of Idaho citizens, generous funders and elected leaders to create an essential resource for education and life-long learning for the state, an economic contributor, and a civic anchor which provide the context that Idaho history provides for Idahoans today and in the future.

0001-00 General	8.00	392,800	464,900	0	0	0	857,700
OT 0001-00 General	0.00	0	155,000	207,700	0	0	362,700
0349-00 Other	0.00	0	56,400	0	0	0	56,400
Total	8.00	392,800	676,300	207,700	0	0	1,276,800

FY 2018 Agency Budget - Request

Detail Report

Agency: 522 - Historical Society, State
 Function: 01 - Historical Preservation & Education

		FTP	Personnel Cost	Operating Expense	Capital Outlay	Trustee/Benefit	Lump Sum	Total
FY 2018 Total Maintenance								
0001-00	General	25.80	1,811,900	960,400	0	31,600	0	2,803,900
OT 0001-00	General	0.00	0	0	61,500	0	0	61,500
OT 0150-01	Dedicated	0.00	0	0	0	0	0	0
0481-09	Dedicated	1.00	68,000	53,500	0	0	0	121,500
OT 0481-09	Dedicated	0.00	0	0	0	0	0	0
0348-00	Federal	10.80	955,800	476,500	0	130,000	0	1,562,300
OT 0348-00	Federal	0.00	0	0	0	0	0	0
0349-00	Other	9.40	613,000	627,200	0	0	0	1,240,200
OT 0349-00	Other	0.00	0	0	0	0	0	0
OT 0349-41	Other	0.00	0	0	0	0	0	0
0450-75	Other	2.00	116,200	144,400	0	0	0	260,600
OT 0450-75	Other	0.00	0	0	0	0	0	0
Total		49.00	3,564,900	2,262,000	61,500	161,600	0	6,050,000

Line Items

12.01 State Museum Expansion and Renovation

The Idaho State Historical Society and the State of Idaho are on the cusp of creating history, with the reopening of Idaho's State Historical Museum. Not since Governor Gooding recommended, and the 1907 Legislature approved the creation of the first State Museum, has such an epic effort been undertaken. This budget request includes funding to open and operate the new museum and realize the collective efforts of Idaho citizens, generous funders and elected leaders to create an essential resource for education and life-long learning for the state, an economic contributor, and a civic anchor which provide the context that Idaho history provides for Idahoans today and in the future.

0001-00	General	8.00	393,100	464,900	0	0	0	858,000
OT 0001-00	General	0.00	0	155,000	207,700	0	0	362,700
0349-00	Other	0.00	0	56,400	0	0	0	56,400
Total		8.00	393,100	676,300	207,700	0	0	1,277,100

12.02 State Records Center

In 2012, the Idaho Legislature authorized the Idaho State Historical Society (ISHS) to manage the record functions of the State Record Center under the direction of the Idaho State Archives. In response to this merger, ISHS was authorized to proceed with a records study from Imerge Consulting to enhance state government records management. Extensive program analysis has informed improvements to ensure the Record Center meet its obligation for records management services for state agencies. This request includes an increase in spending authority and creation of a Records Technician position.

0450-75	Other	1.00	49,300	700	0	0	0	50,000
Total		1.00	49,300	700	0	0	0	50,000

FY 2018 Agency Budget - Request

Detail Report

Agency: 522 - Historical Society, State

Function: 01 - Historical Preservation & Education

	<u>FTP</u>	<u>Personnel Cost</u>	<u>Operating Expense</u>	<u>Capital Outlay</u>	<u>Trustee/Benefit</u>	<u>Lump Sum</u>	<u>Total</u>
12.03 Spending Authority for Federal Grants							
As part of the Capital Campaign to raise \$4 million for the Idaho State Historical Museum's new exhibitions, the Idaho State Historical Society is seeking \$400,000 from the National Endowment for the Humanities (NEH) and \$400,000 from the Institute for Museum and Library Services (IMLS). If awarded, the State Historical Society will need increased spending authority in the federal fund to accept these federal grants as part of its fundraising effort.							
OT 0348-00 Federal	0.00	0	800,000	0	0	0	800,000
Total	0.00	0	800,000	0	0	0	800,000

FY 2018 Total

0001-00 General	33.80	2,205,000	1,425,300	0	31,600	0	3,661,900
OT 0001-00 General	0.00	0	155,000	269,200	0	0	424,200
OT 0150-01 Dedicated	0.00	0	0	0	0	0	0
0481-09 Dedicated	1.00	68,000	53,500	0	0	0	121,500
OT 0481-09 Dedicated	0.00	0	0	0	0	0	0
0348-00 Federal	10.80	955,800	476,500	0	130,000	0	1,562,300
OT 0348-00 Federal	0.00	0	800,000	0	0	0	800,000
0349-00 Other	9.40	613,000	683,600	0	0	0	1,296,600
OT 0349-00 Other	0.00	0	0	0	0	0	0
OT 0349-41 Other	0.00	0	0	0	0	0	0
0450-75 Other	3.00	165,500	145,100	0	0	0	310,600
OT 0450-75 Other	0.00	0	0	0	0	0	0
Total	58.00	4,007,300	3,739,000	269,200	161,600	0	8,177,100

FORM B8.1: PROGRAM REQUEST BY DECISION UNIT					
Agency/Department: Idaho State Historical Society		Request for Fiscal Year : 2018			
Function/Division: Historic Preservation and Education		Agency Number: 522			
Activity/Program:		Function/Activity Number: 1			
		Budget Unit: EDMA			
Original Request Date: September 1, 2016	Revision Request Date: NOV 21 2016	Page: _____ of _____			
Decision Unit Number: 12.01		Descriptive Title: State Museum Expansion and Renovation			
Description	General	Dedicated	Federal	Other	Total
FULL TIME POSITIONS (FTP)					
PERSONNEL COSTS: See Attached Prorated Spreadsheet					
1. Salaries	197,500				\$197,500
2. Benefits	116,700				\$116,700
3. Group Position Funding	78,900				\$78,900
TOTAL PERSONNEL COSTS:	\$393,100				\$393,100
OPERATING EXPENDITURES by summary object:					
1. See attached spreadsheet	619,900			56,400	\$676,300
2.					
3.					
TOTAL OPERATING EXPENDITURES:	\$619,900			\$56,400	\$676,300
CAPITAL OUTLAY by summary object:					
1. See attached spreadsheet	207,700				\$207,700
2.					
3.					
TOTAL CAPITAL OUTLAY:	\$207,700				\$207,700
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	\$1,220,700			\$56,400	\$1,277,100

Attach as many pages as necessary to respond to the following questions:

Please see attached narrative

1. What is being requested and why? What is the agency staffing level for this activity and how much funding, by source, is in the base?
2. What resources are necessary to implement this request?
 - a. List by position: position titles, pay grades, full or part-time status, benefit eligibility, anticipated dates of hire and terms of service.
 - b. Note any existing agency human resources that will be redirected to this new effort and how existing operations will be impacted.
 - c. List any additional operating funds and capital items needed.
3. Provide additional detail about the request, including one-time versus ongoing. Include a description of major revenue assumptions, for example, whether there is a new customer base, fee structure changes, or anticipated grant awards.

4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

See Attached

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Idaho State Historical Society
State Museum Expansion and Renovation

Agency 522
FY 18 Budget Request

Personnel - Ongoing Request
Classified Positions

FTP Classification	Pay Grade	Class Code	Start Date/ Prorated	Hourly Rate	Hours	Annual Prorated Wage	FY 18 Health Insurance	Benefit Percentage	Variable Benefits	Total FY18 General Fund
1 Business/Enterprise Manager	L	06386	8/1/17	\$ 22.26	1906	\$ 42,428	\$ 12,338	0.220185	\$ 9,342	\$ 64,107
1 Customer Service Rep 2 (rentals)	H	01120	8/1/17	\$ 12.37	1906	\$ 23,577	\$ 12,338	0.220185	\$ 5,191	\$ 41,107
1 Customer Service Rep 1 (admissions)	G	01121	10/1/17	\$ 11.60	1560	\$ 18,096	\$ 10,094	0.220185	\$ 3,984	\$ 32,174
1 Marketing Communications	L	05275	8/1/17	\$ 22.26	1906	\$ 42,428	\$ 12,338	0.220185	\$ 9,342	\$ 64,107
1 Membership/Volunteer Coord	K	07940	8/1/17	\$ 19.72	1906	\$ 37,586	\$ 12,338	0.220185	\$ 8,276	\$ 58,200
1 Education Specialist	K	02362	4/1/18	\$ 19.72	520	\$ 10,254	\$ 3,362	0.220185	\$ 2,258	\$ 15,874
1 Curator	K	02713	4/1/18	\$ 19.72	520	\$ 10,254	\$ 3,362	0.220185	\$ 2,258	\$ 15,874
1 Maintenance Craftsman Sr.	H	06632	1/1/18	\$ 12.37	1040	\$ 12,865	\$ 6,730	0.220185	\$ 2,833	\$ 22,427
8						\$ 197,488	\$ 72,900		\$ 43,484	\$ 313,872

FTE Group Positions

PT Group Customer Service retail,											
4	evening/weekend events/facility rental	G	01121	10/1/16	\$ 11.60	1560	\$ 72,384	\$ -	0.09	\$ 6,515	\$ 78,899

Total Prorated Personnel Request for FY18 Budget \$ 269,872 \$ 72,900 \$ 49,999 \$ 392,771

Personnel Annual Ongoing Cost

FTP Classification	Pay Grade	Hourly Rate	Hours	Annual Wage	FY 18 Health Insurance	Benefit Percentage	Variable Benefits	Annual Total	General Fund	FY19 Budget Annualized
1 Business/Enterprise Manager	L	\$ 22.26	2080	\$ 46,301	\$ 13,460	0.220185	\$ 10,195	69,956	\$ 69,956	\$ 5,848
1 Customer Service Rep 2 (rentals)	H	\$ 12.37	2080	\$ 25,730	\$ 13,460	0.220185	\$ 5,665	44,855	\$ 44,855	\$ 3,748
1 Customer Service Rep 1 (admissions)	G	\$ 11.60	2080	\$ 24,128	\$ 13,460	0.220185	\$ 5,313	42,901	\$ 42,901	\$ 10,726
1 Marketing Communications	L	\$ 22.26	2080	\$ 46,301	\$ 13,460	0.220185	\$ 10,195	69,956	\$ 69,956	\$ 5,848
1 Membership/Volunteer Coord	K	\$ 19.72	2080	\$ 41,018	\$ 13,460	0.220185	\$ 9,031	63,509	\$ 63,509	\$ 5,309
1 Education Specialist	K	\$ 19.72	2080	\$ 41,018	\$ 13,460	0.220185	\$ 9,031	63,509	\$ 63,509	\$ 47,635
1 Curator	K	\$ 19.72	2080	\$ 41,018	\$ 13,460	0.220185	\$ 9,031	63,509	\$ 63,509	\$ 47,635
1 Maintenance Craftsman Sr.	H	\$ 12.37	2080	\$ 25,730	\$ 13,460	0.220185	\$ 5,665	44,855	\$ 44,855	\$ 22,427
8				\$ 291,242	\$ 107,680		\$ 64,127	463,049	\$ 463,049	\$ 149,176

FTE Group Positions

PT Group Customer Service retail,											
4	evening/weekend events/facility rental	G	\$ 11.60	2080	\$ 96,512	0	0.09	\$ 8,686	105,198	\$ 105,198	\$ 26,300

Total Ongoing Personnel Request and FY19 Annualized Calculation \$ 387,754 0 \$ 72,813 568,247 \$ 568,247 \$ 175,476

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Idaho State Historical Society
 State Museum Expansion and Renovation
 1-Sep-16

Agency 522
 FY 18 Budget Request

Operating Expenditures by summary object

	Start Date	FY18 Budget Prorated Expenses	FY 18 General Fund Prorated	FY 18		FY19 Annualized Cost	FY 19 Annualized General Fund	FY 19 Annualized Revenue Fund
				Revenue Fund	Prorated			
OT 5201 Repair & Mtnce Service (software license)		POS/Membership software setup	15,000	15,000				
5201 Repair & Mtnce Service (software license)		POS/Membership annual license fee	10,000	10,000				
5201 Repair & Mtnce Service (software license)		Membership software- deduct base	(1,000)	(1,000)				
OT 5151 Consultant		Web Design	70,000	70,000				
OT 5101 General Services		Agency collateral /design/printing	20,000	20,000				
OT 5101 General Services		Textile Digitization - ISU phase 2	50,000	50,000				
5851 Utility Charges	10/1/2017	Occupancy Costs @\$5.50 sq foot prorated 10/1/17	110,138	110,138		146,850	36,713	36,713
5201 Repair & Maintenance Services	10/1/2017	Occupancy Costs @\$5.50 sq foot prorated 10/1/17	110,138	110,138		146,850	36,713	36,713
5201 Repair & Maintenance Services	10/1/2017	Occupancy Costs - additional cost of Janitorial	37,500	37,500		50,000	12,500	12,500
5851 Utility Charges	10/1/2017	Occupancy Costs - deduct base prorated 10/1/17	(27,113)	(27,113)		(36,150)	(9,038)	(9,038)
5201 Repair & Maintenance Services	10/1/2017	Occupancy Costs - deduct base prorated 10/1/17	(27,113)	(27,113)		(36,150)	(9,038)	(9,038)
5501 Mfg & Merch Costs		Startup for Store Merchandise	88,500	88,500				
5501 Mfg & Merch Costs		Store Merchandise deduct base \$32,500	(32,500)	(32,500)				
5101 General Services	10/1/2017	Administrative (9 mo/contracts 12%)	9,099	9,099		12,132	3,033	3,033
5001 Communications	10/1/2017	Administrative - (phones, data lines 10%)	7,583	7,583		10,110	2,528	2,528
5351 Employee Travel	10/1/2017	Administrative travel (9 mo/30%)	22,748	22,748		30,330	7,583	7,583
5251 Administrative Services	10/1/2017	Administrative printing (9 mo/20%)	15,165	15,165		20,220	5,055	5,055
5401 Administrative Supplies	10/1/2017	Administrative supplies (9 mo/18%)	13,649	13,649		18,198	4,550	4,550
5151 Professional Services	10/1/2017	Administrative (9 mo Prof Service contracts 1%)	7,583	7,583		10,110	2,528	2,528
5101 General Services	10/1/2017	Administration - deduct base	(7,500)	(7,500)		(10,000)	(2,500)	(2,500)
5101 General Services	10/1/2017	Museum marketing and promotion	86,250	57,788	28,463	115,000	28,750	19,263
5101 General Services	10/1/2017	Museum marketing/promo- deduct base	(14,700)	(9,849)	(4,851)	(19,600)	(4,900)	(3,283)
5101 General Services		Contracts for collection care	10,000	10,000				
5701 Specific Use Supplies - collections		Collections Care	10,000	10,000				
5701 Specific Use Supplies - collections		Collections Care - deduct base	(3,700)	(3,700)				
5101 General Services	1/1/2018	Education/public programming contracts (6 mo/60%)	32,730	16,365	16,365	65,460	32,730	16,365
5251 Administrative Services	1/1/2018	Education/public programming printing (6 mo/20%)	10,910	5,455	5,455	21,820	10,910	5,455
5701 Specific Use Supplies	1/1/2018	Education/public programming supplies (6 mo/20%)	10,910	5,455	5,455	21,820	10,910	5,455
5101 General Services	1/1/2018	Education/programming - deduct base	(5,000)	(2,500)	(2,500)	(10,000)	(5,000)	(2,500)
5701 Specific Use Supplies	1/1/2018	Exhibitions	6,000	6,000		12,000	6,000	6,000.00
5101 General Services	1/1/2018	Exhibits - IT Multimedia Technology Contract	25,000	25,000		50,000	25,000	25,000.00
5101 General Services	1/1/2018	Exhibits - special contracts	15,800	7,900	7,900	31,600	15,800	7,900.00
5701 Specific Use Supplies	1/1/2018	Exhibits - special supplies	13,200	6,600	6,600	26,400	13,200	6,600.00
5101 General Services	1/1/2018	Exhibits -deduct base	(13,000)	(6,500)	(6,500)	(26,000)	(13,000)	(6,500.00)
Total One Time			155,000	155,000				
Total Ongoing			521,275	464,889	56,387	651,000	211,025	170,380
Total Operating			676,275	619,889	56,387	651,000	211,025	170,380
Total Revenue					56,387			40,646

Idaho State Historical Society
 State Museum Expansion and Renovation
 1-Sep-16

Agency 522
 FY 18 Budget Request

Capital Outlay by summary object

OT	6701 Office Equipment (Furniture)	Museum Store: 75 pieces- shelving, cabinets, fixtures, tables w/storage, showcases, bookcases	55,000
OT	6701 Office Equipment (Furniture)	Community Room: 250 chairs (event seating) Lectern/podium, Stage	42,500
OT	6701 Office Equipment (Furniture)	Classroom: 12 tables, 40 chairs (various), desk,	6,700
OT	6522 Educational Equipment/Furniture	Classroom: AV Equipment, 2 projectors, camera, 3 laptops	5,300
OT	6701 Office Equipment (Furniture)	Exhibit areas: 10 benches various sizes, 11 chairs with rollers	11,000
OT	6701 Office Equipment (Furniture)	Office furniture, 11 desk and 11 chairs, bookcases/file cabinets; storage shelving	25,100
OT	6801 Household appliances	Catering Services: Icemaker, 2 door fridge	7,600
OT	6701 Office Equipment (Furniture)	Catering Services: 30 round tables, 4 table dollies	9,000
OT	6701 Office Equipment (Furniture)	Outdoor Space: 2 bike racks, 5 benches, 6 picnic tables, signage	15,500
OT	6801 Specific Use Equipment	Security cameras: 10 cameras	<u>30,000</u>
		Total Capital Outlay Request	207,700

Decision Unit 12.01: Idaho State Historical Museum Expansion and Renovation

Foreword

The Idaho State Historical Society and the State of Idaho are on the cusp of creating history. We currently stand at the 4th year of envisioning, planning, and advocating for creating the newest State Historical Museum in the United States. Not since Governor Gooding recommended, and the 1907 Legislature approved the creation of the first State Historical Museum, has such an epic effort been undertaken.

This new State Historical Museum will be an extraordinary asset to the state. The goals of the project are to repair and replace aging infrastructure that dates to the museum's opening in 1950; expand the museum to allow space for more educational programs and events, realize a level of national excellence with exhibits that inspire Idahoans' sense of pride in our state, and maintain leadership in being a fundamental educational hub for people of all ages. The Public Value outcome(s) of the Museum renovation and expansion project include serving as an essential resource for education and life-long learning for the state, contributing to the economic vitality of our state through building Idaho's cultural infrastructure and tourism; and creating an informed citizenry who understands the context that Idaho history provides for their present and future lives.

To achieve these goals and outcomes, the museum planning has been conceived and executed with precision and with an eye to current best practices and future trends, especially with regard to creating transformational exhibition experiences and an essential resource for learning. An overview of key project activities over the past 4 years is included for inspiration.

Building renovation and expansion:

LKV Architects, Boise, led the building renovation and expansion effort. This included a programming phase that began in September 2013 to identify public access, education, and facility enhancement/efficiency needs. Design phases followed from January 2014-June 2015 where architectural program priorities were translated into structural design. Because of the booming economy, the first attempt at bidding the building in summer of 2015 was unsuccessful. Additional funds were requested of the Permanent Building Fund Advisory Council and the project was successfully rebid in April of 2016. The construction contract was awarded to Barry Hayes Construction, Idaho Falls, in June 2016. The Museum is currently under construction with anticipated completion in fall of 2017.

Fundraising and private support:

The Foundation for Idaho History, the Agency's non-profit support group, is leading the private fundraising efforts to support the development of all new exhibitions at the new state museum. The WhiteRock consulting group was engaged to assist the Agency in conceiving and executing its first major capital campaign, in the amount of \$4 million. Phases of this campaign include Planning and Preparation, June to October 2014;

Decision Unit 12.01: Idaho State Historical Museum Expansion and Renovation

Nucleus Lead Gifts, June 2014 to April 2015; Major Gifts, June 2014 and-ongoing; and the Public Phase, June 2016 and ongoing. The campaign has achieved significant major gifts from the J. A. and Kathryn Albertsons Family Foundation, Zions Bank, Idaho Forest Group, Harry W. Morrison Foundation, and the Laura Moore Cunningham Foundation, among others. The campaign will continue until 2020, when all multi-year pledges have been realized. Private funds raised to date equal \$1.9 million with \$1.6 million in pending requests, and a \$500,000 public campaign that launched on June 22, 2016.

Exhibitions:

A cornerstone of the new Idaho State Museum included the complete envisioning of exhibition experiences that would be inspirational, emotional, and educational. The Andrew Merrill-Lexington design build consortium was selected for their portfolio of projects; their team includes top multi-media, interpretation, and graphics partners, and a disciplined and inclusive approach to exhibition design, fabrication, and budget control.

Concept planning began in summer of 2014, followed by a Master Plan (December 2014), Schematic Design Plan (December of 2015), and comprehensive visual animations that have been inspiring to donors, agency governance, and state leadership. Formal exhibition storyline testing was facilitated between July 2015 and Spring 2016 by evaluation specialist, Dr. Gloria Totoricagüena, in nine focus groups conducted in all regions of the state and with 30 teachers in a day-long education summit. A Scholar Final Review meeting was held in May 2016 and a Tribal Consultation Summit was held in June 2016. (Attachments 2, 3, 4).

What we learned from exhibition testing informed content and the budget. Key public responses include that Idahoans are highly motivated to visit our State Historical Museum to learn about Idaho's Native People; participants expect to be educated in an entertaining fashion with interactives, sensory use, apps, games, with 60% statewide agreeing that exhibition multi-media immersive experiences are worth the cost; Idahoans across the state want increased access to the State Historical Museum and collections via technology; the Idaho State Historical Society is expected to be fundamental and in a leadership role to the educational mission of Idaho; and there is strong statewide support for the Idaho State Historical Museum renovation—94% say they will visit the Museum when it reopens.

The exhibitions are designed for broad audience appeal via a multi-disciplinary approach to history. Key educator responses includes that nearly all proposed exhibition stories are deemed interesting and useful for Idaho State Standards, Common Core and 21st Century Skill for teachers in K-12 in all disciplines; 96% marked "important" or "very important" that students have an emotional as well as intellectual experience at the new museum, they cannot create this in a classroom; educators responded that 100% of the exhibitions are relevant to all grade levels and have content and skills at all levels K- Career; they see the ability to use the Museum at all levels of complexity; and teachers reported that STEM content and process objectives can easily be incorporated.

Decision Unit 12.01: Idaho State Historical Museum Expansion and Renovation

Because of statewide input and a desire to create the highest quality museum possible for the State of Idaho, the Governor recommended and the Legislature approved an exhibition budget of \$8 million (\$4 million state \$4 million private, forming a public private partnership) during the legislative session of 2016. The current status of exhibition design is at 60% final design with an anticipated shift from “Design” to “Build” in late 2016 or early 2017, with anticipated exhibitions installation after the building has been completed.

Business Plan:

The Governor recommended and the Legislature approved one time funding in FY 2016 to hire a consultant to create a business plan for the new Idaho State Historical Museum so that it could be leveraged to its full potential, operate at the highest level of capacity, efficiency, and professional standards; and achieve an optimum level of financial self-sustainability. Lord Cultural Resources was engaged by the Idaho State Historical Society to prepare a business plan and revenue/expense projections for the Idaho State Historical Museum in the context of its revitalization and reopening in about December 2017. The analyses and projections were based on contextual, comparable and market analyses, site tours, workshops and interviews in Boise, and the experience of the consultants, who were recommended by the Utah Museum of Natural History. The business plan process ran from April of 2016-August 2016. (Attachment 1)

What is being requested?

For FY 2018, the Agency respectfully requests \$392,800 in Personnel; \$676,300 in operating; and \$207,700 on one-time capital support as detailed and defended in the following sections. All requests for the FY2018 budget submittal for the Idaho State Historical Society and new Idaho State Historical Museum are drawn directly from the Lord Cultural Resources Business plan and the significant consultant and staff analyses that inform such recommendations.

Rationale for Request?

It was the intended goal to reopen the new Idaho State Historical Museum with a budget that had a moderate amount of long term General Fund impact. The proposed budget optimizes the public and private investment in the new State Museum and provides the highest opportunity for educational impact and long term sustainable revenue growth. The following recommended investments in personnel, operating, and one-time capital expenditures will require “start-up” (18-24 month) general fund support and a portion of ongoing general fund support, specifically and appropriately related to building occupancy expenses, stewardship of state owned collections, and public education.

However, long term, the opportunity to enhance revenue is significant, as analyzed and transmitted in detail in our comprehensive five year business plan. As we achieve the attendance and program benchmarks, appropriate program expenses can be shifted from general fund to revenue fund.

Decision Unit 12.01: Idaho State Historical Museum Expansion and Renovation

Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

I am extraordinarily proud of the efforts of Agency staff, the Board of Trustees, the Foundation for Idaho History, statewide partnerships and stakeholder participation, and donors and funders who have come together to create this legacy for Idaho.

This is our story, about our state. This story has been framed by Idaho historians, and informed by voices from tribal leaders, students, parents, professionals, and community leaders. This story is a powerful one. One of the land and people and their inextricable relationship over time; one of how three unique geographic regions have prompted residents to pursue distinctive paths; from mining and lumbering in the north, to recreation and wilderness preservation in the center and to making the desert bloom in the south. It is the story of how these three distinct regions unite to create a prosperous state. It's a story of our first people, and then many people who followed, who have made Idaho the place that it is today. It's a place to marvel at historic dress; a place to learn about big science at the Idaho National Lab; and a place where young families can encourage creativity in their children. It's a place where people can explore how the objects that Idaho has stewarded on their behalf since 1881 can be tools for solving their problems. And, perhaps, most importantly, it's a place for each of us to find our place, our personal identity, and the context of our lives today, through the lens of Idaho, this remarkable place that we call home.

Thank you for helping us reach the conclusion of this remarkable journey. Museums in the United States a key economic drivers and contributors to the educational ecosystem (Attachment 5). History provides context and build critical skill, vibrant communities and engaged citizen (Attachment 6).

Every effort has been made to create an Idaho State Historical Museum that will be an essential resource for education and life-long learning for the state, contribute to the economic vitality of our state through building Idaho's cultural infrastructure and tourism; and support an informed citizenry who understands the context that Idaho history provides for their present and future lives. If we do not resource this museum to operate at its highest level of benefit to the citizens of Idaho, we have missed not only the opportunity to leverage the significant public and private investment in this project (\$17.9 million) but we also miss the opportunity to achieve the aspirational outcomes so noted.

Decision Unit 12.01: Idaho State Historical Museum Expansion and Renovation

What resources are necessary to implement this request, what is in the base? Include a description of major revenue assumptions, for example, whether there is a new customer base, fee structure changes

Revenue, Customer Base, and Fees Assumptions:

Summary of Projections (rounded)	Base	Year 1	Year 2	Year 3	Year 4	Year 5	Base	Year 1	Year 2	Year 3	Year 4	Year 5
								%	%	%	%	%
Total On-Site Attendance	39,600	115,000	100,000	95,000	115,000	90,000						
Projected Operating Revenues												
Regular Admissions Revenue	\$69,100	\$545,445	\$474,300	\$507,015	\$613,755	\$480,330	9.8%	27.2%	24.0%	25.2%	23.9%	23.9%
Major Exhibition Surcharge	\$0	\$0	\$0	\$0	\$125,000	\$0	0.0%	0.0%	0.0%	0.0%	4.9%	0.0%
Retail Sales	\$45,400	\$161,000	\$141,400	\$135,673	\$165,878	\$131,116	6.4%	8.0%	7.2%	6.7%	6.5%	6.5%
Rentals	\$8,000	\$82,500	\$100,980	\$111,583	\$113,815	\$125,021	1.1%	4.1%	5.1%	5.5%	4.4%	6.2%
Membership (Agency Wide)	\$16,100	\$172,500	\$163,800	\$156,000	\$187,500	\$163,800	2.3%	8.6%	8.3%	7.8%	7.3%	8.1%
Public and Educational Programs	\$6,500	\$54,545	\$47,430	\$50,702	\$61,376	\$48,033	0.9%	2.7%	2.4%	2.5%	2.4%	2.4%
Other Earned Income	\$0	\$10,000	\$20,000	\$20,000	\$25,000	\$20,000	0.0%	0.5%	1.0%	1.0%	1.0%	1.0%
Assumed Private Offset of Exhibition Costs		\$120,000	\$150,000	\$152,000	\$355,000	\$155,000	0.0%	6.0%	7.6%	7.6%	13.8%	7.7%
Assumed State Offset of Occupancy Costs		\$293,700	\$312,396	\$317,070	\$355,766	\$326,418	0.0%	14.7%	15.8%	15.8%	13.9%	16.2%
Existing State Support	\$562,600	\$562,600	\$562,600	\$562,600	\$562,600	\$562,600	79.5%	28.1%	28.5%	28.0%	21.9%	28.0%
Total Projected Revenues	\$707,700	\$2,002,290	\$1,972,906	\$2,012,643	\$2,565,690	\$2,012,318	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Projected Operating Expenses (excluding depreciation)												
Salaries, Wages, Benefits	\$542,800	\$1,177,000	\$1,183,515	\$1,189,964	\$1,301,921	\$1,201,886	75.7%	57.8%	58.5%	58.5%	51.8%	58.7%
Occupancy	\$72,300	\$293,700	\$312,396	\$317,070	\$355,766	\$326,418	10.1%	14.4%	15.4%	15.6%	14.1%	15.9%
Exhibitions	\$26,000	\$120,000	\$150,000	\$152,000	\$355,000	\$155,000	3.6%	5.9%	7.4%	7.5%	14.1%	7.6%
Programs	\$10,000	\$109,089	\$94,860	\$101,403	\$122,751	\$96,066	1.4%	5.4%	4.7%	5.0%	4.9%	4.7%
Collections Care	\$3,700	\$20,000	\$15,000	\$15,000	\$15,000	\$15,000	0.5%	1.0%	0.7%	0.7%	0.6%	0.7%
General & Administrative	\$10,000	\$117,700	\$94,681	\$95,197	\$130,192	\$96,151	1.4%	5.8%	4.7%	4.7%	5.2%	4.7%
Retail Cost of Goods Sold	\$32,800	\$88,550	\$77,770	\$74,620	\$91,233	\$72,114	4.6%	4.4%	3.8%	3.7%	3.6%	3.5%
Marketing	\$19,600	\$109,250	\$95,000	\$90,250	\$143,750	\$85,500	2.7%	5.4%	4.7%	4.4%	5.7%	4.2%
Total Projected Expenses	\$717,200	\$2,035,289	\$2,023,222	\$2,035,504	\$2,515,613	\$2,048,135	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Surplus/ (Deficit)	(\$9,500)	(\$33,000)	(\$50,316)	(\$22,861)	\$50,076	(\$35,817)	-1.3%	-1.6%	-2.5%	-1.1%	2.0%	-1.7%

Decision Unit 12.01: Idaho State Historical Museum Expansion and Renovation

Projected On-Site ISM Attendance (rounded)	Base	Year 1	Year 2	Year 3	Year 4	Year 5	Base	Year 1	Year 2	Year 3	Year 4	Year 5
Projected Total On-Site Attendance							39,600	115,000	100,000	95,000	115,000	90,000
Attendance by Main Segment												
Residents (Boise MSA)	45%	55%	45%	40%	45%	40%	17,820	63,250	45,000	38,000	51,750	36,000
School Groups	25%	20%	20%	20%	20%	20%	9,900	23,000	20,000	19,000	23,000	18,000
Tourists	30%	25%	35%	40%	35%	40%	11,880	28,750	35,000	38,000	40,250	36,000
Total	100%	100%	100%	100%	100%	100%	39,600	115,000	100,000	95,000	115,000	90,000
Attendance by Weekday/Weekend												
Weekdays	50%	50%	50%	50%	50%	50%	19,800	57,500	50,000	47,500	57,500	45,000
Weekend Days	50%	50%	50%	50%	50%	50%	19,800	57,500	50,000	47,500	57,500	45,000
Total	100%	100%	100%	100%	100%	100%	39,600	115,000	100,000	95,000	115,000	90,000
Design Day Calculation												
Total Projected Attendance								115,000	100,000	95,000	115,000	90,000
Total Weekend Day Attendance								57,500	50,000	47,500	57,500	45,000
Average Weekend day Attendance								553	481	457	553	433
Weekend day Attendance in Higher Attendance Month (10% above average)								608	529	502	608	476
Maximum Number of People in Building at One Time (30% of daily total)								182	159	151	182	143
Attendance by Ticket Category												
Adult (25-61)		30%	30%	30%	30%	30%		34,500	30,000	28,500	34,500	27,000
Senior (62+)/Youth (13-24)		15%	15%	15%	15%	15%		17,250	15,000	14,250	17,250	13,500
Child (3-12)/Veterans/Weekday Afternoon		20%	20%	20%	20%	20%		23,000	20,000	19,000	23,000	18,000
School Group		20%	20%	20%	20%	20%		23,000	20,000	19,000	23,000	18,000
Non-School Group		1%	1%	1%	1%	1%		1,150	1,000	950	1,150	900
Indirect Paid /Unpaid		14%	14%	14%	14%	14%		16,100	14,000	13,300	16,100	12,600
Total		100%	100%	100%	100%	100%		115,000	100,000	95,000	115,000	90,000

Decision Unit 12.01: Idaho State Historical Museum Expansion and Renovation

Regular Admissions Revenue	Charges		Year 1	Year 1	Year 2	Year 2	Year 3	Year 3	Year 4	Year 4	Year 5	Year 5	
	Base	Years 1-2	Years 3-5	Attendance	Admissions								
Adult (25-61)		\$10.00	\$11.00	34,500	\$345,000	30,000	\$300,000	28,500	\$313,500	34,500	\$379,500	27,000	\$297,000
Senior (62+)/Youth (13-24)		\$8.00	\$9.00	17,250	\$138,000	15,000	\$120,000	14,250	\$128,250	17,250	\$155,250	13,500	\$121,500
Child (3-12)/Veterans/Weekday after 2 p.m.		\$5.00	\$6.00	23,000	\$115,000	20,000	\$100,000	19,000	\$114,000	23,000	\$138,000	18,000	\$108,000
School Group		\$0.00	\$0.00	23,000	\$0	20,000	\$0	19,000	\$0	23,000	\$0	18,000	\$0
Non-School Group		\$7.00	\$8.00	1,150	\$8,050	1,000	\$7,000	950	\$7,600	1,150	\$9,200	900	\$7,200
Indirect Paid /Unpaid		\$0.00	\$0.00	16,100	\$0	14,000	\$0	13,300	\$0	16,100	\$0	12,600	\$0
Total Revenue (before discounts)					\$606,050		\$527,000		\$563,350		\$681,950		\$533,700
Total Revenue (after discounts)	\$69,100			115,000	\$545,445	100,000	\$474,300	95,000	\$507,015	115,000	\$613,755	90,000	\$480,330
Average Revenue per Visitor					\$4.74		\$4.74		\$5.34		\$5.34		\$5.34

Please see Business Plan for all fees.

Personnel Assumptions:

- Admission, membership, and retail revenue opportunities are directly related and proportional to maximizing attendance and program participants. So,
- To attain 115,000 visitors requires an assessment of and promotion to target audiences; resultant potential retail (\$1.40 per person) and membership sales (1.3% of attendance) are directly proportional to the amount of visitation.
- Facility Rental opportunities require dedicated staff, trained to maximize business/enterprise and additional revenue opportunities in our new museum.
- School and Public Education requires dedication staff, trained to maximize the applied and informal learning opportunities in our new museum.
- Marketing/promotion/membership requires dedicated staff to increase awareness of the museum, convert awareness into action and attendees, convert attendees into members and donors.
- The Museum’s visual appeal and customer service experience expectations requires dedicated staff to ensure the facility is 100% top working order, 6 days per week.
- The Museum’s collections and exhibitions are managed, changed, and continually mined for public access opportunities.

Decision Unit 12.01: Idaho State Historical Museum Expansion and Renovation

Personnel Resources Required:

- One FTP Business Enterprise Manager to oversee the front-end operations of the museum including retail, facility use rentals on evening and weekends, and to ensure high levels of customer service delivery.
- One FTP Customer Service Representative 2 to manage and book rentals, programs, and events.
- Four part-time (Group) Customer Service Representatives for rental and event staffing. These positions will ensure the program has appropriate on-site staffing to deliver customer service for rentals and events.
- One FTP Customer Service Representative 1 to serve as a weekday/weekend receptionist, to provide a continuous staffing presence/oversight of group positions for admissions and retail sales.
- Four part-time (Group) Customer Service Representatives, for weekend and evening admissions and retail sales. The museum will see the greatest visitation during regular weekend hours; the positions here are vital to provide the appropriate levels of service needed for smooth and profitable operations.
- One FTP Marketing Communications Specialist, to enhance information and awareness of the new State Museum and Agency services, particularly those that are fee based and also can contribute to long term revenue enhancement.
- One FTP Membership and Volunteer Coordinator, to leverage membership revenues and cost avoidance opportunities through volunteer coordination.
- One FTP Education Specialist to ensure implementation of robust educational programs, including pre-school-adult and statewide programming through technology-based access. Making the museum accessible through outreach is vital.
- One FTP for a Maintenance Craftsman Senior, to ensure that the museum campus is maintained daily and sustainably at the highest quality level.
- One FTP curator, to ensure that collections on exhibition are rotated on a scheduled basis, that special exhibitions of state collections can be offered more frequently to enhance attendance and revenue, and that public access to the state owned collections are enhanced.

Decision Unit 12.01: Idaho State Historical Museum Expansion and Renovation

Operating Assumptions:

- Systems infrastructure needs to be improved; especially those related to capturing membership and visitation demographics, to leverage this information for visitor and donor communication and for rapid turn-around correspondence.
- The overall Agency “look” has to be updated in advance of museum opening, including the web-site, and design templates for collateral and media communications.
- Web-site needs to be redesigned to house outreach technology initiatives, including textile digitization platform, downloadable videos, and museum virtual tours.
- Base building occupancy expense is calculated at \$5.50 per square foot @46,700 square feet plus an allocation for janitorial. This cost per square foot number has been validated by local private sector experts and DPW.
- Marketing and promotion is estimated at \$.95 per person.
- Collections require ongoing conservation supplies and strategic treatment.
- Public Programs engage and provide for deep educational experiences.
- Exhibitions require ongoing specialized maintenance, especially regarding high tech interactives.

Operating Resources Required:

Line Item appropriations are requested for the following:

Data Base, Web, Digitization

- Upgrade existing customer relationship management and point of sale systems. Consolidating data will allow us to communicate more effectively with our stakeholders, track our museum store inventory, analyze visitor demographics, create new opportunities for revenue generation through the creation of an online store, and build our donor information.
- Upgrade existing website to motivate on-site visits and statewide/universal access. The visual impact by updating fonts and graphics with a cohesive brand, more imagery which reflects a diverse audience, links among Agency sites and to other site neighbors, to respond to statewide mandate, virtual exhibitions and better digital interface, on-line registration and payment options.
- Implement Phase II that will create 300 new high-resolution 2D stacked photographs and 3D photogrammetric models of dresses and fashion accessories. The Idaho Museum of Natural History (IMNH) is partnering with Idaho State Historical Society (ISHS) to help create a new online exhibition, *150 Years of Idaho Fashion* that will showcase textile collections of the State Historical Museum.

Decision Unit 12.01: Idaho State Historical Museum Expansion and Renovation

- Cost of Goods Sold, Investment required creating new product line for museum store, which will result in enhanced revenue.
- Building Occupancy General Administrative, funding requested to accommodate increased utilities, janitorial and related building operations costs per square foot, based upon professional estimates. Funding requested for general operations, based on percentages.
- Marketing and promotion, to achieve the attendance projections, an increase in marketing expenditures will reinforce the basis for the higher projected attendance levels and to better serve a statewide mandate. For the purposes of these projections we estimate \$0.95 per visitor.
- Collections Management/Care, to establish a more reasonable base budget for stewardship of approximately 250,000 state owned collections.
- Education Program Materials, to maximize educational opportunities that will be generated from exhibitions for schools, families, tourists, and digital outreach and school outreach projects; National History Day, and public events.
- Exhibitions will comprise 17,485 nsf of space. Funding is requested for routine maintenance, a maintenance contract for the high tech interactives and multi-media, as well as for temporary exhibitions.

One time Capital Replacement Assumptions:

- Capital Request(s) for furniture includes replacement of outdated existing tables, chairs, etc. needed to outfit the museum for facility use and rental to enhance revenue; educational programs, general public comfort, and to replace outdated office furniture.
- Capital Request(s) for museum store fixturing replaces outdated fixturing to create a more visually appealing aesthetic and enhance product merchandising.
- Capital Request(s) for security cameras adds to the existing security system infrastructure accommodated in the building budget.

FORM B8.1: PROGRAM REQUEST BY DECISION UNIT

Agency/Department: Idaho State Historical Society
 Function/Division: Historical Preservation and Education
 Activity/Program: _____

Request for Fiscal Year : 2018
 Agency Number: 522
 Function/Activity Number: _____
 Budget Unit: EDMA / EDMB

Original Request Date: September 1, 2016 Revision Request Date: _____
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Decision Unit Number: 12.02 **Descriptive Title:** Spending Authority for Special Initiatives

Description	General	Dedicated	Federal	Other	Total
FULL TIME POSITIONS (FTP 1 additional FTP PERSONNEL COSTS:					
1. Salaries		27,400			\$27,400
2. Benefits		21,900			\$21,900
3. Group Position Funding					
TOTAL PERSONNEL COSTS:		\$49,300			\$49,300
OPERATING EXPENDITURES by summary object:					
1. 5001 Communication Costs		500			\$500
2. 5401 Office Supplies		200			\$200
3. 5150 General Services			550,000		\$550,000
TOTAL OPERATING EXPENDITURES:		\$700	\$550,000		\$550,700
CAPITAL OUTLAY by summary object:					
1.					
2.					
3.					
TOTAL CAPITAL OUTLAY:					
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL		\$50,000	\$550,000		\$600,000

Attach as many pages as necessary to respond to the following questions:

Please see attached narrative

1. What is being requested and why? What is the agency staffing level for this activity and how much funding, by source, is in the base?
2. What resources are necessary to implement this request?
 - a. List by position: position titles, pay grades, full or part-time status, benefit eligibility, anticipated dates of hire and terms of service.
 - b. Note any existing agency human resources that will be redirected to this new effort and how existing operations will be impacted.
 - c. List any additional operating funds and capital items needed.
3. Provide additional detail about the request, including one-time versus ongoing. Include a description of major revenue assumptions, for example, whether there is a new customer base, fee structure changes, or anticipated grant awards.
4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

Decision Unit 12.02: Increase spending authority for the State Record Center and Federal Fund

1. What is being requested and why? What is the agency staffing level for this activity and how much funding, by source, is in the base?

The Agency is requesting an increase in spending authority to support the Idaho State Record Center and to accommodate significant federal grants, if received, for the Idaho State Historical Museum Capital Campaign.

INCREASE SPENDING AUTHORITY AND ESTABLISH RECORDS TECHNICIAN FTP FOR STATE RECORD CENTER

In 2012, the Idaho Legislature authorized the Idaho State Historical Society (ISHS) to manage the record functions of the State Record Center under the direction of the Idaho State Archives. In response to this merger, ISHS was authorized to proceed with a records study from Imerge Consulting to enhance state government records management. In response to the study, ISHS has undergone extensive program analysis and implemented technology updates. Through these improvements, ISHS has identified the need for support staff with more advanced technical skills. Current staffing levels and classifications do not meet the operational needs of the State Record Center; therefore, the Idaho State Historical Society is requesting spending authority commensurate with the impact of reclassifying two existing positions and establishing an FTP with spending authority for a full-time, permanent Records Technician (now currently a part-time group position).

- Pay grade was changed for the Records Management Supervisor from J to K

Rationale: The Records Management Supervisor worked at a level beyond the scope of responsibilities of a level J position. Additionally, this adjustment addressed internal equity between the incumbent's position and other agency managerial position levels, which are K level.

- Office Specialist I was reclassified to a Technical Records Specialist I

Rationale: The Office Specialist 1 (OS1) position did not accurately reflect the work requirements of this position. This position requires the ability to provide research, analysis, problem solving and greater use of judgment. The Technical Records Specialist I (TRS1) position is a better description of the responsibilities.

- Establish a full-time, benefit eligible, permanent, classified position as a Records Technician

Rationale: The State Record Center has a statutory obligation to provide record management services, which includes a dedicated, daily service to state agencies. State agencies rely on secure and efficient access of their inventory in order to carryout critical records responsibilities, such as responding to public information requests and ensuring transparency in government. The record center has a statewide impact on the day-to-day operations of state agencies. Given the insufficient staffing levels of this program, upper-level Idaho State Archives staff is often reallocated to the State Record Center to maintain the continuity of operations. A disruption in this service negatively impacts the business needs of other

Decision Unit 12.02: Increase spending authority for the State Record Center and Federal Fund

state agencies; therefore, it's vital that the State Record Center maintains its daily service. When archivists subsidize the staffing at the State Record Center, it inhibits the essential services of Idaho State Archives.

The State Record Center is a cost recovery program and appropriated through dedicated funding. The current personnel budget for the record center is \$115,600. This request would increase the spending authority in the personnel line item by \$49,300.

2. What resources are necessary to implement this request?

The State Record Center's fees will fund the updates to the job classifications for the three positions.

- a. List by position: position titles, pay grades, full or part-time status, benefit eligibility, anticipated dates of hire and terms of service.
 - Records Management Supervisor: Pay Grade J to K, full-time, benefit eligible, permanent
 - Technical Records Specialist I: Pay Grade F to H, full-time, benefit eligible, permanent
 - Records Technician: Pay Grade F, full-time, benefit eligible, permanent

- b. Note any existing agency human resources that will be redirected to this new effort and how existing operations will be impacted.

The key impact of this request is the redirection of existing human resources to ensure the optimum efficiency of the State Record Center management.

Records Management Supervisor position and Technical Records Specialist I positions exist but increased spending authority is needed to accommodate the ongoing fiscal impact of recent salary adjustments.

The State Record Center has relied on one part-time group position to meet the statutory responsibility to provide record management services, such as inventory access for public record requests and legal review. The enhanced Records Technician position will provide consistent support to state agencies with secure deliveries, record transfers and inventory management by interfacing with the records management software.

In the absence of the above support position, these critical services fall to the Records Management Supervisor and Idaho State Archives staff, which results in inefficient use of management-level positions.

Further, the current staffing deficiency impacts the Records Management Supervisor's ability to fulfill primary responsibilities, such as high-level management of a cost-recovery program and statewide technical assistance in current record management best practices.

Decision Unit 12.02: Increase spending authority for the State Record Center and Federal Fund

- c. List any additional operating funds and capital items needed.

This request includes a minimal increase in office supplies and communication costs. No additional capital items will be required.

3. Provide additional detail about the request, including one-time versus ongoing. Include a description of major revenue assumptions, for example, whether there is a new customer base, fee structure changes, or anticipated grant awards.

In compliance with the recommendations of the 2013 Idaho State Archives State Records Study, this is a request for ongoing support for the State Record Center. The modification of staffing levels for the State Record Center is necessary to meet the current operational needs of this cost-recovery program. The only fee increase since the 2012 merger has been 10 cents per box storage fees, which was utilized on increased rental fees. The current fee structure will be re-evaluated in April 2017 to determine what, if any, fees need to be updated.

4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

The State Record Center provides secure storage and efficient access to approximately 35,000 boxes of state agency government records under retention, containing more than 400,000 files with complex file management systems from agencies across the state. The State Record Center annually responds to approximately 4,988 records requests from state agencies. State agencies rely on the State Record Center to efficiently and securely access vital records to in turn meet their own statutory obligations and business needs.

The staffing /spending authority modifications requested will ensure state agencies receive responsive and accurate access to their records and increase efficient use of the skills of the Records Management Supervisor. The State Record Center and Idaho State Archives are in year three of a five-year plan to implement key recommendations from the 2013 Idaho State Archives State Records Study (See Roadmap below). To ensure that the study recommendations are implemented in a timely, thoughtful and strategic manner, the Records Management Supervisor requires support for daily operations so that full attention can be brought to bear on the future records management needs of the State of Idaho, as directed by statute 67-4131.

A lack of funding for this operation would restrict ISHS from meeting its statutory obligation to provide records management services to government entities.

Decision Unit 12.02: Increase spending authority for the State Record Center and Federal Fund

ROADMAP				
Year One	Year Two	Year Three	Year Four	Year Five
Current State		Transition		Future State
Governance and Compliance				
Records Study				
	RITS Replacement			
	Develop Standards and Policies	Implement Standards and Policies	Audit Agencies for Compliance	
	Physical Records Assessment (ISA)	De Accession Non-Permanent Archival Records		
	Retention Schedule Review	Assess Long Term and Permanent Records for Digital Preservation		
	Taxonomies, Classification and Metadata Requirements			
	Training Materials			
	RM Staff Training	Agency Training		
	Assess Agency Systems of Record			Emerging Technologies
	Digital Preservation Assessment	Digital Records Process Analysis for Long Term Preservation		
	Risk Assessment and Analysis for Records at Risk in Legacy Systems			
	Legislative Review and Funding Assessments			
		Product Selection		
			Implementation	
Communication Plan and Change Management				

INCREASE SPENDING AUTHORITY IN THE FEDERAL FUND

As part of the Capital Campaign to raise \$4 million for the Idaho State Historical Museum’s new exhibitions, the Idaho State Historical Society is seeking \$400,000 from the National Endowment for the Humanities (NEH) and \$150,000 from the Institute for Museum and Library Services (IMLS). If awarded, the State Historical Society will need increased spending authority in the federal fund to accept these federal grants as part of its fundraising effort.

Agency/Department:	Self-Governing Agencies	Agency Number:	522
Function/Division:	Idaho State Historical Society	Function/Activity Number:	
Activity/Program:	Historical Society	Budget Unit:	EDMA
		Fiscal Year:	2018
Original Request Date:	9/1/2016	Fund Name:	General
Revision Date:		Fund Number:	0001-00
Revision #:		Budget Submission Page #	of

PCN	CLASS CODE	DESCRIPTION	Indicator Code	FTP	FY 2017 SALARY	FY 2017 HEALTH BENEFITS	FY 2017 VAR BENEFITS	FY 2017 TOTAL	FY 2018 SALARY CHANGE	FY 2018 CHG HEALTH BENEFITS	FY 2018 CHG VAR BENEFITS	TOTAL BENEFIT CHANGES
		Totals from Wage and Salary Report (WSR):										
		Permanent Positions	1	25.80	1,191,930	315,792	263,994	1,771,716	(44,146)	31,476	(574)	30,902
		Board & Group Positions	2		44,278	0	4,492	48,770				
		Elected Officials & Full Time Commissioners	3	0.00	0	0	0	0		0	0	0
		TOTAL FROM WSR		25.80	1,236,208	315,792	268,486	1,820,486		31,476	(574)	30,902
		FY 2017 ORIGINAL APPROPRIATION		1,821,400	25.70	1,236,829	315,951	268,621	1,821,400			
		Unadjusted Over or (Under) Funded:	Est Difference	(0.10)	621	169	135	914		Calculated overfunding is 1% of Original Appropriation		
		Adjustments to Wage & Salary:										
		Add Funded / Subtract Unfunded - Vacant or Authorized - Positions:										
		Retire Cd	Adjustment Description / Position Title									
					0	0	0	0		0	0	0
				0.00	0	0	0	0		0	0	0
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				0.00	0	0	0	0		0	0	0
				0.00	0	0	0	0		0	0	0
				0.00	0	0	0	0		0	0	0
				0.00	0	0	0	0		0	0	0
				0.00	0	0	0	0		0	0	0
		Other Adjustments:										
				0.00	0	0	0	0		0	0	0
				0.00	0	0	0	0		0	0	0
				0.00	0	0	0	0		0	0	0
				0.00	0	0	0	0		0	0	0
				0.00	0	0	0	0		0	0	0
		Estimated Salary Needs:										
		Permanent Positions	1	25.80	1,191,930	315,792	263,994	1,771,716		31,476	(574)	30,902
		Board & Group Positions	2	0.00	44,278	0	4,492	48,770			0	0
		Elected Officials & Full Time Commissioners	3	0.00	0	0	0	0		0	0	0
		Estimated Salary and Benefits		25.80	1,236,208	315,792	268,486	1,820,486		31,476	(574)	30,902
		Adjusted Over or (Under) Funding:	Orig. Approp	(0.10)	600	200	100	900		Calculated overfunding is 0% of Original Appropriation		
			Est. Expend	0.00	600	200	100	900		Calculated overfunding is 0% of Estimated Expenditures		
			Base	0.00	600	200	100	900		Calculated overfunding is 1% of the Base		
Personnel Cost Reconciliation - Relation to Zero Variance --->												

DU		Original Appropriation	FTP	FY 17 Salary	FY 17 Health Ben	FY 17 Var Ben	FY 2017 Total		FY 18 Chg Health Bens	FY 18 Chg Var Bens	Total Benefit Change
3.00	FY 2017 ORIGINAL APPROPRIATION	1,821,400	25.70	1,236,829	315,951	268,621	1,821,400				
	Rounded Appropriation										
	Appropriation Adjustments:										
4.11	Reappropriation		0.00	0	0	0	0				
4.31	Supplemental		0.00	0	0	0	0				0
5.00	FY 2017 TOTAL APPROPRIATION		25.70	1,236,800	316,000	268,600	1,821,400				
	Expenditure Adjustments:										
6.31	FTP or Fund Adjustment		0.10	0	0	0	0				0
6.51	Transfer Between Programs		0.00	0	0	0	0				0

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7.00		FY 2017 ESTIMATED EXPENDITURES	25.80	1,236,800	316,000	268,600	1,821,400
		Base Adjustments:					
8.31		Transfer Between Programs	0.00	0	0	0	0
8.41		Removal of One-Time Expenditures	0.00	(44,800)	0	(10,000)	(54,800)
8.51		Base Reduction	0.00	0	0	0	0
9.00		FY 2018 BASE	FTP	FY 18 Salary	FY18 Health Ben	FY 18 Var Ben	FY 2018 Total
			25.80	1,192,000	316,000	258,600	1,766,600
10.11		Change in Health Benefit Costs			31,600		31,500
10.12		Change in Variable Benefits Costs				(600)	(600)
		Subtotal CEC Base:	Indicator Code				0
10.51		Annualization	25.80	1,192,000	347,500	258,000	1,797,500
10.61		CEC for Permanent Positions	1.00%	0	0	0	0
10.62		CEC for Group Positions	1.00%	11,500		2,500	14,000
10.63		CEC for Elected Officials & Commissioners		400		0	400
				0		0	0
11.00		FY 2018 PROGRAM MAINTENANCE	25.80	1,203,900	347,500	260,500	1,811,900
		Line Items:					
12.01		State Museum Expansion and Renovation	8.00	269,900	72,900	50,000	392,800
12.02							0
12.03							0
13.00		FY 2018 TOTAL REQUEST	33.80	1,473,800	420,400	310,500	2,204,700

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7.00		FY 2017 ESTIMATED EXPENDITURES	10.80	643,900	172,000	141,800	957,700
		Base Adjustments:					
8.31		Transfer Between Programs	0.00	0	0	0	0
8.41		Removal of One-Time Expenditures	0.00	(18,500)	0	(4,100)	(22,600)
8.51		Base Reduction	0.00	0	0	0	0
9.00		FY 2018 BASE	FTP	FY 18 Salary	FY18 Health Ben	FY 18 Var Ben	FY 2018 Total
			10.80	625,400	172,000	137,700	935,100
10.11		Change in Health Benefit Costs			13,200		13,200
10.12		Change in Variable Benefits Costs				(200)	(200)
		Subtotal CEC Base:	Indicator Code				0
10.51		Annualization	10.80	625,400	185,200	137,500	948,100
10.61		CEC for Permanent Positions	1.00%	0	0	0	0
10.62		CEC for Group Positions	1.00%	6,200		1,400	7,600
10.63		CEC for Elected Officials & Commissioners		100		0	100
				0		0	0
11.00		FY 2018 PROGRAM MAINTENANCE	10.80	631,700	185,200	138,900	955,800
		Line Items:					
12.01							0
12.02							0
12.03							0
13.00		FY 2018 TOTAL REQUEST	10.80	631,700	185,200	138,900	955,800

7.00	FY 2017 ESTIMATED EXPENDITURES		9.40	408,700	117,600	83,700	610,000
	Base Adjustments:						
8.31	Transfer Between Programs		0.00	0	0	0	0
8.41	Removal of One-Time Expenditures		0.00	(10,700)	0	(2,400)	(13,100)
8.51	Base Reduction		0.00	0	0	0	0
9.00	FY 2018 BASE		9.40	398,000	117,600	81,300	596,900
10.11	Change in Health Benefit Costs				11,500		11,500
10.12	Change in Variable Benefits Costs				(200)		(200)
	Subtotal CEC Base:	Indicator Code	9.40	398,000	129,100	81,100	608,200
10.51	Annualization			0	0	0	0
10.61	CEC for Permanent Positions	1.00%		3,300		700	4,000
10.62	CEC for Group Positions	1.00%		700		100	800
10.63	CEC for Elected Officials & Commissioners			0		0	0
11.00	FY 2018 PROGRAM MAINTENANCE		9.40	402,000	129,100	81,900	613,000
	Line Items:						
12.01							0
12.02							0
12.03							0
13.00	FY 2018 TOTAL REQUEST		9.40	402,000	129,100	81,900	613,000

Agency/Department: Self-Governing Agencies	Agency Number: 522
Function/Division: Idaho State Historical Society	Function/Activity Number:
Activity/Program: Historical Society	Budget Unit: EDMA
	Fiscal Year: 2018
Original Request Date: 9/1/2016	Fund Name: Capitol Commission Operating
Revision Date: _____	Fund Number: 0481-09
Revision #: _____	Budget Submission Page # 42 of 67

PCN	CLASS CODE	DESCRIPTION	Indicator Code	FTP	FY 2017 SALARY	FY 2017 HEALTH BENEFITS	FY 2017 VAR BENEFITS	FY 2017 TOTAL	FY 2018 SALARY CHANGE	FY 2018 CHG HEALTH BENEFITS	FY 2018 CHG VAR BENEFITS	TOTAL BENEFIT CHANGES
		Totals from Wage and Salary Report (WSR):										
		Permanent Positions	1	1.00	43,762	12,240	9,723	65,725	(1,621)	1,220	(21)	1,199
		Board & Group Positions	2		0	0	0	0				0
		Elected Officials & Full Time Commissioners	3	0.00	0	0	0	0		0	0	0
		TOTAL FROM WSR		1.00	43,762	12,240	9,723	65,725		1,220	(21)	1,199
		FY 2017 ORIGINAL APPROPRIATION	68,300	1.00	45,476	12,720	10,104	68,300				
		Unadjusted Over or (Under) Funded:	Est Difference	0.00	1,716	480	381	2,575		Calculated overfunding is 3.8% of Original Appropriation		
		Adjustments to Wage & Salary:										
		Add Funded / Subtract Unfunded - Vacant or Authorized - Positions:										
		Retire Cd Adjustment Description / Position Title										
				0.00	0	0	0	0		0	0	0
				0.00	0	0	0	0		0	0	0
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				0.00	0	0	0	0		0	0	0
				0.00	0	0	0	0		0	0	0
		Other Adjustments:										
				0.00	0	0	0	0		0	0	0
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				0.00	0	0	0	0		0	0	0
				0.00	0	0	0	0		0	0	0
		Estimated Salary Needs:										
		Permanent Positions	1	1.00	43,762	12,240	9,723	65,725		1,220	(21)	1,199
		Board & Group Positions	2	0.00	0	0	0	0			0	0
		Elected Officials & Full Time Commissioners	3	0.00	0	0	0	0		0	0	0
		Estimated Salary and Benefits		1.00	43,762	12,240	9,723	65,725		1,220	(21)	1,199
		Adjusted Over or (Under) Funding:	Orig. Approp	0.00	1,700	500	400	2,600		Calculated overfunding is 3.8% of Original Appropriation		
			Est. Expend	0.00	1,700	500	400	2,600		Calculated overfunding is 3.8% of Estimated Expenditures		
			Base	0.00	1,700	500	400	2,600		Calculated overfunding is 3.9% of the Base		
Personnel Cost Reconciliation - Relation to Zero Variance --->												

DU		Original Appropriation	FTP	FY 17 Salary	FY 17 Health Ben	FY 17 Var Ben	FY 2017 Total		FY 18 Chg Health Bens	FY 18 Chg Var Bens	Total Benefit Change
3.00	FY 2017 ORIGINAL APPROPRIATION	68,300	1.00	45,476	12,720	10,104	68,300				
	Rounded Appropriation		1.00	45,500	12,700	10,100	68,300				
4.11	Appropriation Adjustments:										
	Reappropriation		0.00	0	0	0	0				
4.31	Supplemental		0.00	0	0	0	0				0
5.00	FY 2017 TOTAL APPROPRIATION		1.00	45,500	12,700	10,100	68,300				
6.31	Expenditure Adjustments:										
	FTP or Fund Adjustment		0.00	0	0	0	0				0
6.51	Transfer Between Programs		0.00	0	0	0	0				0

7.00		FY 2017 ESTIMATED EXPENDITURES		1.00	45,500	12,700	10,100	68,300	
		Base Adjustments:							
8.31		Transfer Between Programs		0.00	0	0	0	0	
8.41		Removal of One-Time Expenditures		0.00	(1,500)	0	(400)	(2,000)	
8.51		Base Reduction		0.00	0	0	0	0	
9.00		FY 2018 BASE		FTP	FY 18 Salary	FY18 Health Ben	FY 18 Var Ben	FY 2018 Total	
				1.00	43,900	12,700	9,700	66,300	
10.11		Change in Health Benefit Costs				1,200		1,200	
10.12		Change in Variable Benefits Costs					0	0	
		Subtotal CEC Base:		Indicator Code	1.00	43,900	13,900	9,700	67,500
10.51		Annualization				0	0	0	
10.61		CEC for Permanent Positions		1.00%		400	100	500	
10.62		CEC for Group Positions		1.00%		0	0	0	
10.63		CEC for Elected Officials & Commissioners				0	0	0	
11.00		FY 2018 PROGRAM MAINTENANCE		1.00	44,300	13,900	9,800	68,000	
		Line Items:							
12.01								0	
12.02								0	
12.03								0	
13.00		FY 2018 TOTAL REQUEST		1.00	44,300	13,900	9,800	68,000	

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7.00		FY 2017 ESTIMATED EXPENDITURES	2.00	75,100	24,500	16,000	115,500	
		Base Adjustments:						
8.31		Transfer Between Programs	0.00	0	0	0	0	
8.41		Removal of One-Time Expenditures	0.00	(2,300)	0	(500)	(2,800)	
8.51		Base Reduction	0.00	0	0	0	0	
9.00		FY 2018 BASE	FTP	FY 18 Salary	FY18 Health Ben	FY 18 Var Ben	FY 2018 Total	
			2.00	72,800	24,500	15,500	112,800	
10.11		Change in Health Benefit Costs			2,400		2,400	
10.12		Change in Variable Benefits Costs				0	0	
		Subtotal CEC Base:	Indicator Code	2.00	72,800	26,900	15,500	115,200
10.51		Annualization		0	0	0	0	
10.61		CEC for Permanent Positions	1.00%	700		200	900	
10.62		CEC for Group Positions	1.00%	100		0	100	
10.63		CEC for Elected Officials & Commissioners		0		0	0	
11.00		FY 2018 PROGRAM MAINTENANCE	2.00	73,600	26,900	15,700	116,200	
		Line Items:						
12.02		Spending Authority for Special Initiatives	1.00	29,600	13,500	6,200	49,300	
							0	
							0	
13.00		FY 2018 TOTAL REQUEST	3.00	103,200	40,400	21,900	165,500	

Form B4: Part C - Contract Inflation

Agency: Idaho State Historical Society

Division:

Program:

Agency Number: 522

Function/Activity Number: _____

Request **2018**

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Original Submission _____ or Revision No. _____

(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)
Part C: Contract (identify who and what)	FY 2014 Actual	FY 2015 Actual	FY 2016 Actual	FY 2017 Est. Exp.	Contract Date	Term of Contract (Year x of x)	FY 2018 Contractual % Change	FY 2018 Change	FY 2018 Total
Oxford Hall Partners (Kendal St.)		-	100,490	102,809	05/2015	2 of 3	3.00%	3,100	105,909
								-	-
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								-	-
								-	-
								-	-
								-	-
								-	-
Total	-	-	100,490	102,809			3.02%	3,100	105,909
FundSource							Proportion		
General	-	-	-	-			40.0%	1,200	42,400
Dedicated	-	-	100,490	102,809			30.0%	900	31,800
Federal	-	-	-	-			30.0%	900	31,800
Total	-	-	100,490	102,809			100.00%	3,000	106,000

Notes: Oxford Hall Partners is Kendal St. storage space for Records Center. This is year 2 of 3.

FORM B7: ONE-TIME OPERATING EXPENDITURES & ONE-TIME CAPITAL OUTLAY SUMMARY

Agency/Department: Idaho State Historical Society
 Program (If applicable): _____

Request for Fiscal Year: 2018
 Agency Number: 522
 Function/Activity Number: 1

Original Request Date:
9/1/16

Revision Request Date:

Page: 47 of 67

Priority Order	Program	DU	Fund	Sub-object Code	Item/Description	Mileage	Date Acquired	Quantity in Stock	Request Quantity Desired	Request Unit Cost	Request Total Cost
1	01	10.31	0001	6410	Desktop computers (HP Performance)		2012	9	8	800	6,400
2	01	10.31	0001	6410	Desktop computers (HP Value)		2011	60	7	700	4,900
3	01	10.31	0001	6415	Monitors		2009	20	10	200	2,000
4	01	10.31	0001	6410	Laptops		2012	8	3	1,100	3,300
5	01	10.31	0001	6630	SUV, 4WD, replace 2 with 1	202219 / 77877	2001 / 1997	14	1	29,900	29,900
6	01	10.31	0001	6710	History Center Lobby		2006	1	1	15,000	15,000
											0
											0
Grand Total by Program										Subtotal of filtered items	\$61,500
											\$61,500
	01										61,500
											0
											0
											0
Grand Total by Decision Unit										\$61,500	
		10.31									61,500
											0
											0
											0
Grand Total by Fund Source										\$61,500	
			0001								61,500
											0
											0
											0
Grand Total by Category										\$61,500	
				6710				112	30		15,000
				6410				1	1		14,600
				6415				77	18		2,000
				6630				20	10		29,900
								14	1		0
								0	0		0
								0	0		0
								0	0		0

AGENCY NAME:							
FACILITY INFORMATION SUMMARY FOR FISCAL YR			2018	BUDGET REQUEST		Include this summary w/ budget request.	
Address, City, Zip, Purpose	Fiscal Year	Sq Ft	\$/Sq Ft	Cost/Yr	Work Areas	Sq Ft/FTE	FTP's, Temps and Comments
Idaho History Center	2018 request	62,433	\$ 5.50	\$ 343,074	34	1,836	FTP's - 24, Temps, etc. - 11
2205 Old Penitentiary Rd.	2017 estimate	62,433	\$ 5.34	\$ 333,082	34	1,836	
Boise, ID 83712	2016 actual	62,433	\$ 5.18	\$ 323,380	34	1,836	
Admin office, public archives, library	Change (request vs actual)	0	\$ -	19,694	0	0	
	Change (estimate vs actual)	0	\$ -	9,702	0	0	
Old Idaho Penitentiary	2018 request	145,583	\$ 0.49	\$ 70,746	8	18,198	
2445 Old Penitentiary Rd.	2017 estimate	145,583	\$ 0.47	\$ 68,686	8	18,198	
Boise, ID 83712	2016 actual	145,583	\$ 0.46	\$ 66,685	8	18,198	
Historical Museum	Change (request vs actual)	0	\$ -	4,061	0	0	
	Change (estimate vs actual)	0	\$ -	2,001	0	0	
Old US Assay Office	2018 request	4,350	\$ 6.34	\$ 27,560	15	290	FTP's -9 , Temps, etc. - 3
210 Main Street	2017 estimate	4,350	\$ 6.15	\$ 26,757	15	290	
Boise, ID 83702	2016 actual	4,350	\$ 5.97	\$ 25,978	15	290	
Historic Building - Offices	Change (request vs actual)	0	\$ -	1,582	0	0	
	Change (estimate vs actual)	0	\$ -	779	0	0	
Idaho State Historical Museum	2018 request	46,740	\$ 7.35	\$ 343,700	18	2,597	
610 N Julia Davis Dr	2017 estimate	46,740	\$ 0.33	\$ 15,400	0	-	
Boise, ID 83702	2016 actual	28,075	\$ 0.53	\$ 14,955	0	-	
Historical Museum	Change (request vs actual)	18,665	\$ 17.61	328,745	18	2,597	
	Change (estimate vs actual)	18,665	\$ 0.02	445	0	0	
Bureau of Reclamation Bldg	2018 request	8,100	\$ 3.27	\$ 26,522	15	540	FTP's -8, Temps, etc. - 2
214 S Broadway Ave	2017 estimate	8,100	\$ 3.18	\$ 25,750	15	540	
Boise, ID 83712	2016 actual	8,100	\$ 3.09	\$ 25,000	15	540	
Historic Building - Offices	Change (request vs actual)	0	\$ -	1,522	0	0	
	Change (estimate vs actual)	0	\$ -	750	0	0	
TOTAL (PAGE 1 of 3)	2018 request	267,206	\$ 3.04	\$ 811,602	90	2,969	
	2017 estimate	267,206	\$ 1.76	\$ 469,675	72	3,711	
	2016 actual	248,541	\$ 1.83	\$ 455,998	72	3,452	
	Change (request vs actual)	18,665	\$ 19.05	355,604	18	-483	
	Change (estimate vs actual)	18,665	\$ 0.73	13,677	0	259	
TOTAL (ALL PAGES)	2018 request	343,356	8	\$ 1,015,784	95	13,993	
	2017 estimate	343,356	6	\$ 667,909	77	14,735	
	2016 actual	324,691	7	\$ 659,905	77	14,476	
	Change (request vs actual)	18,665	1	355,879	18	-483	
	Change (estimate vs actual)	18,665	0	8,004	0	259	

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AGENCY NAME:								
FACILITY INFORMATION SUMMARY FOR FISCAL YR			2018	BUDGET REQUEST		Include this summary w/ budget request.		
Address, City, Zip, Purpose	Fiscal Year	Sq Ft	\$/Sq Ft	Cost/Yr	Work Areas	Sq Ft/FTE	FTP's, Temps and Comments	
State Museum Storage Facility	2018	request	26,160	\$ 0.47	\$ 12,216	2	13,080	FTP's -2 , Temps, etc. - 2
867 Whitewater Park Blvd	2017	estimate	26,160	\$ 0.45	\$ 11,860	2	13,080	FTP's -2 , Temps, etc. - 2
Boise, ID 83703	2016	actual	<u>26,160</u>	<u>\$ 0.44</u>	<u>\$ 11,515</u>	<u>2</u>	<u>13,080</u>	FTP's -2 , Temps, etc. - 1
Artifact Storage	Change (request vs actual)		0	\$ -	701	0	0	
	Change (estimate vs actual)		0	\$ -	345	0	0	
State Records Center Storage	2018	request	15,460	\$ 8.14	\$ 125,862	2	7,730	FTP's -0, Temps, etc. -
5327 and 5383 Kendall St.	2017	estimate	15,460	\$ 7.90	\$ 122,196	2	7,730	FTP's -0, Temps, etc. -
Boise, ID 83702	2016	actual	<u>15,460</u>	<u>\$ 7.67</u>	<u>\$ 118,637</u>	<u>2</u>	<u>7,730</u>	FTP's -0, Temps, etc. -
Records Center Storage	Change (request vs actual)		0	\$ -	7,225	0	0	
	Change (estimate vs actual)		0	\$ -	3,559	0	0	
Capitol Collections Storage	2018	request	10,000	\$ 2.51	\$ 25,090	1	10,000	FTP's -1, Temps, etc. -
877 Whitewater Park Blvd	2017	estimate	10,000	\$ 2.44	\$ 24,359	1	10,000	FTP's -1, Temps, etc. -
Boise, ID 83703	2016	actual	<u>10,000</u>	<u>\$ 2.37</u>	<u>\$ 23,650</u>	<u>1</u>	<u>10,000</u>	FTP's -1, Temps, etc. -
Records Storage	Change (request vs actual)		0	\$ -	1,440	0	0	
	Change (estimate vs actual)		0	\$ -	709	0	0	
Museum-Pioneer Village	2018	request	3,500	\$ 0.45	\$ 1,592	0	-	FTP's -0, Temps, etc. -
610 N Julia Davis	2017	estimate	3,500	\$ 0.44	\$ 1,545	0	-	FTP's -0, Temps, etc. -
Boise, ID 83702	2016	actual	<u>3,500</u>	<u>\$ 0.43</u>	<u>\$ 1,500</u>	<u>0</u>	<u>-</u>	FTP's -0, Temps, etc. -
	Change (request vs actual)		0	\$ -	92	0	0	
	Change (estimate vs actual)		0	\$ -	45	0	0	
	2018	request	0	\$ -	\$ -	0	-	
	2017	estimate	0	\$ -	\$ -	0	-	
	2016	actual	<u>0</u>	<u>\$ -</u>	<u>\$ -</u>	<u>0</u>	<u>-</u>	
	Change (request vs actual)		0	\$ -	0	0	0	
	Change (estimate vs actual)		0	\$ -	0	0	0	
TOTAL (PAGE 2 of 3)	2018	request	55,120	\$ 2.99	\$ 164,760	5	11,024	
	2017	estimate	55,120	\$ 2.90	\$ 159,960	5	11,024	
	2016	actual	<u>55,120</u>	<u>\$ 2.82</u>	<u>\$ 155,302</u>	<u>5</u>	<u>11,024</u>	
	Change (request vs actual)		0	\$ -	9,458	0	0	
	Change (estimate vs actual)		0	\$ -	4,658	0	0	
TOTAL (ALL PAGES)	2018	request		\$ -				
	2017	estimate		\$ -				
	2016	actual		\$ -				
	Change (request vs actual)				0			
	Change (estimate vs actual)				0			

AGENCY NAME:								
FACILITY INFORMATION SUMMARY FOR FISCAL YR			2018	BUDGET REQUEST		Include this summary w/ budget request.		
Address, City, Zip, Purpose	Fiscal Year		Sq Ft	\$/Sq Ft	Cost/Yr	Work Areas	Sq Ft/FTE	FTP's, Temps and Comments
Franklin Historic Properties	2018	request	7,300	\$ 2.14	\$ 15,595	0	-	FTP's -0 , Temps, etc. -
111 East Main St.	2017	estimate	7,300	\$ 2.07	\$ 15,141	0	-	FTP's -0 , Temps, etc. -
Franklin, ID 83237	2016	actual	<u>7,300</u>	<u>\$ 2.01</u>	<u>\$ 14,700</u>	0	-	FTP's -0 , Temps, etc. -
Historic Site	Change (request vs actual)		0	\$ -	895	0	0	
	Change (estimate vs actual)		0	\$ -	441	0	0	
Stricker/Rock Creek Station	2018	request	5,750	\$ 3.03	\$ 17,398	0	-	FTP's -0 , Temps, etc. -
3715 Stricker Cabin Rd.	2017	estimate	5,750	\$ 2.94	\$ 16,892	0	-	FTP's -0 , Temps, etc. -
Hansen, ID 83334	2016	actual	<u>5,750</u>	<u>\$ 2.85</u>	<u>\$ 16,400</u>	0	-	FTP's -0 , Temps, etc. -
Historic Site	Change (request vs actual)		0	\$ -	998	0	0	
	Change (estimate vs actual)		0	\$ -	492	0	0	
Pierce Court House	2018	request	800	\$ 0.27	\$ 218	0	-	FTP's -0 , Temps, etc. -
103 S Main St.	2017	estimate	800	\$ 0.26	\$ 211	0	-	FTP's -0 , Temps, etc. -
Pierce, ID 83546	2016	actual	<u>800</u>	<u>\$ 0.26</u>	<u>\$ 205</u>	0	-	FTP's -0 , Temps, etc. -
Historic Site	Change (request vs actual)		0	\$ -	13	0	0	
	Change (estimate vs actual)		0	\$ -	6	0	0	
Warden's House	2018	request	3,600	\$ 0.29	\$ 1,061	0	-	FTP's -0 , Temps, etc. -
2410 Old Penitentiary Road	2017	estimate	3,600	\$ 0.29	\$ 1,030	0	-	FTP's -0 , Temps, etc. -
Boise, ID 83712	2016	actual	<u>3,600</u>	<u>\$ 0.28</u>	<u>\$ 1,000</u>	0	-	FTP's -0 , Temps, etc. -
	Change (request vs actual)		0	\$ -	61	0	0	
	Change (estimate vs actual)		0	\$ -	30	0	0	
Bishops House	2018	request	3,580	\$ 1.44	\$ 5,150	0	-	FTP's -0 , Temps, etc. -
2420 Old Penitentiary Road	2017	estimate	3,580	\$ 1.40	\$ 5,000	0	-	FTP's -0 , Temps, etc. -
Boise, ID 83712	2016	actual	<u>3,580</u>	<u>\$ 4.55</u>	<u>\$ 16,300</u>	0	-	FTP's -0 , Temps, etc. -
	Change (request vs actual)		0	\$ -	-11,150	0	0	
	Change (estimate vs actual)		0	\$ -	-11,300	0	0	
TOTAL (PAGE 3 of 3)	2018	request	21,030	\$ 1.87	\$ 39,422	0	-	
	2017	estimate	21,030	\$ 1.82	\$ 38,274	0	-	
	2016	actual	<u>21,030</u>	<u>\$ 2.31</u>	<u>\$ 48,605</u>	0	-	
	Change (request vs actual)		0	\$ -	-9,183	0	0	
	Change (estimate vs actual)		0	\$ -	-10,331	0	0	
TOTAL (ALL PAGES)	2018	request			\$ -			
	2017	estimate			\$ -			
	2016	actual			\$ -			
	Change (request vs actual)				0			
	Change (estimate vs actual)				0			

**CAPITAL BUDGET REQUEST
SIX-YEAR PLAN FY 2018 THROUGH FY 2023
CAPITAL IMPROVEMENTS**

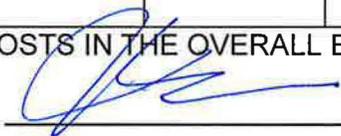
Idaho State Historical Society						
Project Description/Location	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022	FY 2023
Old Penitentiary (Boise)						
Stabilization of 1907 Steam Plant						
Stabilization 1899 Cell Block		65,000				
Old Pen Upgrade: Front Entry-Gift Shop-Restroom Lobby area		100,000				
Rehabilitation of Women's Ward				50,000		
Doors and windows of 1951 steam plant			75,000			
Replace Horse Barn Shed Roofs	50,000					
Replace Guard House Roof			50,000			
Repair 1950 Cell House		32,000				
Safety Upgrades 1954 Max Security					80,000	
Trusty's Dorm Rehab Phase I				100,000		
Trusty's Dorm Rehab Phase II					100,000	
Trusty's Dorm Rehab Phase III						100,000
Idaho History Center						
Chillers (additional cost)	150,000					
State Archives storage enhancements design fees	325,000					
State Archives storage enhancement				4,000,000		
Replace roof	350,000					
Install UV filtration on foyer windows/interior upgrades/enhance public area				100,000		
Restore and repair beams, add metal endcaps, replacing damaged drywall			150,000			
Infrastructure plan/assessment						
Rock Creek Station (Hansen)						
Utility Upgrades Stricker House				45,000		
Stricker home and outbuildings painting and repair						
Replace roof; paint Stricker home; complete signage along Oregon Trail	150,000					
Rock Creek Store and Log building						
Franklin Historic Site (Franklin)						
FCMI Store stabilization and Exterior Restoration	100,000					
FCMI Store Interior Restoration		100,000				
Relic Hall baseboard heating		95,000				
Hatch House Kitchen and Restroom				100,000		
Update/repair public restroom						100,000
Pierce Court House (Pierce)						
Replace roof						100,000
Front porch stabilization and site drainage	60,000					
Bureau of Reclamation Building (Boise)						
Refurbish paint throughout building and repair basement		150,000				
Assay Office						
Interior: repainting/floor refinishing/repair leak in basement ceiling; exterior: replace/restore historic fence/upgrade outbuilding/install lighting		250,000				
Landscape/interpretive enhancements through Project LIV (funded by Boise City Parks and Recreation)			300,000			
Museum (Boise)						
Pioneer Village Building and Roof Repair			68,000			
Museum Renovation and Addition						
Museum exhibitions (raised from private funds)						
Whitewater Park Blvd Storage Facility						
Renovate shed addition		100,000				
Storage condition assessment				125,000		
Storage environmental improvements					300,000	
Mezzanine for additional space		300,000				
Bishops House						
Roof replacement and electrical safety	150,000					
Old Penitentiary Historic District Roadway						
Roadway and engineering and Phase I repairs						
Roadway and engineering and Phase II repairs						
Yearly Totals	1,335,000	1,192,000	643,000	4,520,000	480,000	300,000
	\$8,470,000					
	Agency Head Signature					
	Date					

Agency Head Signature _____
Date _____

**CAPITAL BUDGET REQUEST
FY 2018
ALTERATION AND REPAIR PROJECTS**

AGENCY: Idaho State Historical Society		
PROJECT DESCRIPTION/LOCATION	COST	PRIORITY
Replace Chillers at the Idaho History Center In 2015, the Agency contracted with Fulcher Engineering to do a detailed study of the Idaho History Center. Based upon this study, the Agency requested \$200,000 (and was approved for \$100,000) in FY 2017 A and R funding to replace the chillers in the IHC. Musgrove engineering has recently been consulted to validate the budget needed to initiate this work. They estimate an additional \$150,000 is needed to engineer and replace the Chillers which have exceeded their lifespan.	\$150,000	1

PLEASE INCLUDE ANY ANTICIPATED ASBESTOS COSTS IN THE OVERALL BUDGET.

Agency Head Signature: 

Date: Aug 5, 2016

**FY 2018
CAPITAL BUDGET REQUEST
ALTERATION AND REPAIR PROJECTS**

AGENCY: Idaho State Historical Society		
PROJECT DESCRIPTION/LOCATION	COST	PRIORITY
<p>Enhance Public Access to Stricker Ranch and Rock Creek Station</p> <p>Background: The Rock Creek Station and Stricker Home site dates from 1865 and includes the Stricker House, Rock Creek Store, a pioneer cemetery, and numerous outbuildings. This historic site, listed in the National Register of Historic Places in 1980 and located south of Hansen, was an early transportation center serving the Oregon Trail, Overland mail stage route, and the Kelton Freight Road. Annual site visitation is 5,000 visitors and is used for a multitude of community events.</p> <p>Rationale: There is clear evidence of damage</p> <p>Scope of work:</p> <p><u>Replace</u> cedar roof</p> <p><u>Repair/replace</u> rotted windows/sills; scrape,</p> <p><u>Prime and repaint</u> Stricker Ranch house;</p> <p><u>Complete</u> restoration work on Rock Creek Station Store (new roof, walls, floor stabilization)</p>	\$150,000	2

PLEASE INCLUDE ANY ANTICIPATED ASBESTOS COSTS IN THE OVERALL BUDGET.

Agency Head Signature: _____

Date: Aug 5, 2016

FY 2018
CAPITAL BUDGET REQUEST
ALTERATION AND REPAIR PROJECTS

AGENCY: Idaho State Historical Society		
PROJECT DESCRIPTION/LOCATION	COST	PRIORITY
<p>Replace roof, repaint and improve electrical safety, Bishops' House Boise</p> <p>Background: The Historic Bishops' House, located on the Old Penitentiary grounds, was once home to a succession of the Episcopal Bishops of Idaho. The Bishops who served as the head of Episcopal Diocese of Idaho lived in this home with their families while serving in this capacity. The original house was built in the late 1880's and was remodeled to its current, towered Queen Anne style Victorian home in 1899. It was moved to the Old Penitentiary site and has been owned by the state since 1980. The ISHS intends that the historical character of the house and grounds be maintained in perpetuity and that its history be interpreted and it continues to be open to the public for viewing and use for special events.</p> <p>Rationale: The historic home is used consistently by the public for special educational events, meetings and rentals and is showing signs of significant wear. The current roof is deteriorated and subsequent leaking issues are causing damage to the exterior and interior of the building. The electrical system has not been upgraded since the house was moved to the OP site. Currently, there are several areas of concern as to the safety of the system. Because of the public use of this building, it is important to address these needs for public safety.</p> <p>Scope of work:</p> <p><u>Roof:</u> Replace roof and gutters</p> <p><u>Paint:</u> Paint exterior</p> <p><u>Electrical:</u> Inspect, repair, and replace system as needed</p>	\$180,000	3

PLEASE INCLUDE ANY ANTICIPATED ASBESTOS COSTS IN THE OVERALL BUDGET.

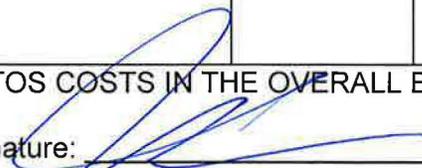
Agency Head Signature: _____

Date: Aug 5, 2016

FY 2018
CAPITAL BUDGET REQUEST
ALTERATION AND REPAIR PROJECTS

AGENCY: Idaho State Historical Society		
PROJECT DESCRIPTION/LOCATION	COST	PRIORITY
<p>Replace Roof Idaho History Center</p> <p>Background: The Idaho History Center (68,000 SF) Houses the Idaho State Archives, Administrative Office, and public reception/classroom/vending area.</p> <p>Rationale:</p> <p>The current roof on the IHC is EPDM, a rubber material for membrane roofing. As a synthetic rubber, it is carefully engineered to have particular material properties; it is light and resistant to sun damage.</p> <p>The roof has reached the end of its useful life span and water is leaking into archival storage areas and public research areas</p> <p>Scope of Work:</p> <p>Design and replace roof 68,000 square foot</p> <p>80 MM membrane and 30 year warranty</p>	\$350,000	4

PLEASE INCLUDE ANY ANTICIPATED ASBESTOS COSTS IN THE OVERALL BUDGET.

Agency Head Signature: 

Date: Aug 5, 2016

**FY 2018
CAPITAL BUDGET REQUEST
ALTERATION AND REPAIR PROJECTS**

AGENCY: Idaho State Historical Society		
PROJECT DESCRIPTION/LOCATION	COST	PRIORITY
<p>Stabilize FCMI building, Franklin Idaho</p> <p>Background: The Franklin Co-operative Mercantile Institution Building (located between the Hatch House and the Relic Hall) was acquired in 1923 to use as a museum. The Relic Hall was created to replace the building for display purposes. The building is a rare example of a stone false-front building that dates to 1869.</p> <p>Rationale: The foundation has cracked and is sinking into the ground, causes structural problems, wall cracks, and roof misalignment. This work needs to be done to avoid additional damage and in alignment with future public access possibilities.</p> <p>Scope of work:</p> <p><u>Survey</u> and determine the required steps to stabilize the building, including an in depth inspection of the foundation down to the footings, rubble stone foundation, condition of the mortar; determine amount of moisture in and around the foundation.</p> <p><u>Analyze</u> results and create and implement stabilization plan to ensure structural stabilization of foundation and necessary repairs to the related damaged areas (cracks in walls, windows, and floors and exterior repairs, including those to the roof and mortar.)</p> <p><u>Implement</u> stabilization program including cleaning of exterior of building, and restoration/repair of damaged areas.</p> <p><u>Concurrently</u> assess long term public access needs of the site and plan for interior restoration; proposal to be submitted in a future budget request.</p>	\$100,000	5

PLEASE INCLUDE ANY ANTICIPATED ASBESTOS COSTS IN THE OVERALL BUDGET.

Agency Head Signature: 

Date: Aug 5, 2016

FY 2018
CAPITAL BUDGET REQUEST
ALTERATION AND REPAIR PROJECTS

AGENCY: Idaho State Historical Society		
PROJECT DESCRIPTION/LOCATION	COST	PRIORITY
<p>Pierce Courthouse Front Porch/Foundation Assessment, Stabilization and Site Drainage, Pierce, Idaho</p> <p>The Pierce Courthouse was built in 1862 serving governmental needs in Shoshone County until 1885. The Idaho State Historical Society owns the site and building but operates it in partnership with the nearby Howard J. Bradbury Memorial Logging Museum.</p> <p>The Courthouse foundation and front porch need to be assessed for stabilization to provide for public safety and ensuring structural integrity. The grounds need to be re-graded to facilitate rain and snow runoff to protect this valuable asset.</p> <p>This was an approved FY 2015 project that had to be deferred in FY 2015 to reallocate funds for life/safety needs.</p>	\$60,000	6

PLEASE INCLUDE ANY ANTICIPATED ASBESTOS COSTS IN THE OVERALL BUDGET.

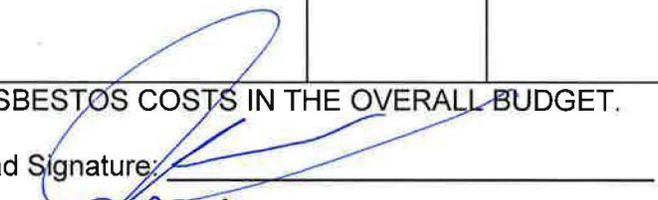
Agency Head Signature: 

Date: Aug 5, 2016

FY 2018
CAPITAL BUDGET REQUEST
ALTERATION AND REPAIR PROJECTS

AGENCY: Idaho State Historical Society		
PROJECT DESCRIPTION/LOCATION	COST	PRIORITY
<p>Replace Roof Horse Barn, Old Pen</p> <p><u>Background:</u> Old Penitentiary Historic District is comprised of numerous buildings that represented a wide range of dates and materials from the territorial era to the present.</p> <p><u>Rationale:</u> ISHS has been cited by state building safety regarding this roof as it is a safety hazard.</p> <p><u>Scope of Work:</u></p> <p>Replace roof in a historically accurate manner</p>	\$50,000	7

PLEASE INCLUDE ANY ANTICIPATED ASBESTOS COSTS IN THE OVERALL BUDGET.

Agency Head Signature: 

Date: Aug 5, 2016

FY 2018
CAPITAL BUDGET REQUEST
ALTERATION AND REPAIR PROJECTS

AGENCY: Idaho State Historical Society		
PROJECT DESCRIPTION/LOCATION	COST	PRIORITY
<p>Design Fees for construction of additional storage space for essential government records at the Idaho State Archives.</p> <p>Background: The Idaho State Archives building phases one and two were constructed respectively in 1998 and 2004. The 68,000 sf building was maximized through the conversion of static shelving to compact mobile shelving, completed in 2010. Currently this facility stewards 138,000 cubic feet of government records of permanent historic value. Storage is nearly at full capacity and this planning is necessary to serve the future records management services of the state of Idaho with the proper storage of state records under retention including permanent historical records deemed for transfer to the Idaho State Archives.</p> <p>Rational: The State Records Center, under the Idaho State Historical Society, is responsible for the records management services for state government. Presently the State Records Center is located in an off-site leased storage facility. Expanding the State Archives Building to provide additional storage for the holdings of the State Records Center ensures efficiencies for management of centralized storage of state records. As reported in the Imerge Consulting study, the streamline of state records management will enhance constituent access to public and historical records ensuring the responsible management of state records and long-term historical preservation of the state's history. Consolidating these separate facilities will result in time savings for staff now required to drive daily between facilities.</p> <p>Scope of work: To design a proposed expansion of 30,000 square feet on the south side of the Idaho State Archives.</p>	\$325,000	8

PLEASE INCLUDE ANY ANTICIPATED ASBESTOS COSTS IN THE OVERALL BUDGET.

Agency Head Signature: _____

Date: _____

[Handwritten Signature]
[Handwritten Date: Aug 5, 2016]

NOV 14 2016

**Federal Funds Inventory Form
As Required by Idaho Code 67-1917**

Reporting Agency/Department: Idaho State Historical Society
Contact Person/Title: Rosemary McClenahan

STARS Agency Code: 522
Contact Phone Number: (208) 514-2307

Fiscal Year: 2018
Contact Email: rosemary.mcclenahan@ishs.idaho.gov

CFDA#/Cooperative Agreement # /Identifying #	Grant Type	Federal Granting Agency	Grant title	Description	Pass Through Federal Money From Other State Agency	FY 2016 Available Funds	FY 2016 Actual Expenditures	FY 2017 Estimated Available Funds	FY 2018 Estimated Available Funds	State Approp [Y] Yearly or [C] Continuous	MOE requirement [Y] Yes or [N] No	Known Reductions; Plan for 10% or More Reduction
15.904 / P14AF00052	Formula	NPS	FFY14 SHPO Historic Preservation Fund Grants-In-Aid	Preserve historic and archaeological sites in the USA.	N/A	40,530	40,530	0	0	Y	Y	9/30/2015
15.904 / P15AF00041	Formula	NPS	FFY15 SHPO Historic Preservation Fund Grants-In-Aid	Preserve historic and archaeological sites in the USA.	N/A	598,485	584,497	13,988	0	Y	Y	9/30/2016
15.904 / P16AS00039	Formula	NPS	FFY16 SHPO Historic Preservation Fund Grants-In-Aid	Preserve historic and archaeological sites in the USA.	N/A	732,247	79,679	652,568	0	Y	Y	9/30/2017
15.904 / No award to date	Formula	NPS	FFY17 SHPO Historic Preservation Fund Grants-In-Aid	Preserve historic and archaeological sites in the USA.	N/A	0	0	732,247	0	Y	Y	9/30/2018 - 10% would reduce staff by up to 1.5 FTP
15.238 / L10AC20531-000515.238 / L10AC20531-0005	Competitive	BLM	Idaho BLM Challenge Cost Share - Archeology Month	Preserve heritage resources and provide the public with information about Idaho's history and prehistory.	N/A	10,880	7,783	0	0	Y	Y	9/30/2015
15.238 L16AC00145	Competitive	BLM	Idaho BLM Challenge Cost Share - Archeology Month	Preserve heritage resources and provide the public with information about Idaho's history and prehistory.	N/A	6,400	0	0	0	Y	Y	05/31/2021 - 10% or more reduction for annual modification would lead to reduction in programming available to public.
15.224 / L15AC00282	Competitive	BLM	Idaho BLM - Cultural Resource Management / Data Share	Shared multi-agency initiative for historic and archaeological sites on public lands		15,000	0	0	0	Y	N	09/20/2020 - 10% or more reduction for annual modification would lead to reduction in program output.
15.926 / P13AP00096	Competitive	NPS	Bear River Massacre NHL	Oversee and manage archeological and defining features inventory, maps and materials for Bear River Massacre Battle site.	N/A	30,275	16,391	13,884	0	Y	N	11/1/2016 - Project completed.
15.904 / P15AP00002	Competitive	NPS	Rapid River Fishery	Work in partnership with the Nez Perce Tribe to complete a nomination of the Rapid River Fishery to the National Register of Historic Places.	N/A	25,090	3,383	21,707	0	Y	Y	09/30/2016 - Project completed.

89.003 / NAR16-RC-10273-16	Competitive	NHPRC	Idaho Board SHRAB/SNAP Grant	Fund statewide regional training on archive preservation practices. Offer the board's regnant program.	N/A	17,350	134	17,216	0	Y	Y	12/31/2016
45.149 / PJ-50127-13	Competitive	NEH	Idaho Digital Newspaper Program	2nd Round Funding for Digitization 200,000 total pages of ID newsprint published between 1863 and 1922.	N/A	366,649	68,456	298,193	250,000	Y	N	08/31/2017 - 10% or more reduction for annual modification would lead to reduction in program output.
Total						1,388,542	712,489	1,398,803	0			

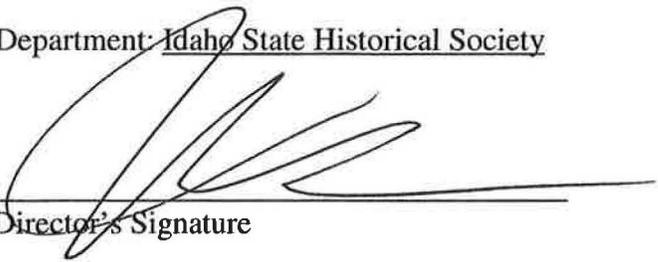
Total FY 2016 All Funds Appropriation (DU 1.00)	\$5,892,900
Federal Funds as Percentage of Funds	\$1,415,200 24%

*** Report must be submitted to the Division of Financial Management and Legislative Services Office as part of your budget request.

Director Attestation for Performance Measurement Report

In accordance with *Idaho Code* 67-1904, I certify the data provided in the Performance Measurement Report has been internally assessed for accuracy, and, to the best of my knowledge, is deemed to be accurate.

Department: Idaho State Historical Society



Director's Signature



Date

Please return to:

Division of Financial Management
304 N. 8th Street, 3rd Floor
Boise, Idaho 83720-0032

FAX: 334-2438
E-mail: info@dfm.idaho.gov

Part I – Agency Profile

Agency Overview

The Idaho State Historical Society is an extraordinary system of cultural and historic resources comprised of the Idaho State Historical Museum, Old Idaho Penitentiary, Idaho State Archives, Idaho State Records Center, State Historic Preservation Office, and the Historic Sites Program.

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

Mission Statement:

Idaho State Historical Society (ISHS) preserves and promotes Idaho's cultural heritage.

Vision:

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

Impact:

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 on the state's history and how it has shaped every aspect of citizens' lives— land, communities, government, and people—while also illuminating how history sheds light on the future.

The Idaho State Historical Society engages the 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.

Core Functions/Idaho Code

Idaho Code, Title 67, Chapter 26, states that the Idaho State Historical Society is within the Department of Self-governing Agencies (67-2601).

Idaho Code 67-41 states that the agency's trustees shall:

- Identify, preserve, and protect sites, monuments, and points of interest in Idaho of historic merit (67-4114)
- Protect archaeological and vertebrate paleontological sites and resources on public land (67-4119)
- Govern the agency and administer the powers and duties required to preserve and protect any historical record of the history and culture of Idaho” (67-4123)
 - Senate Bill 1011 (2009), passed by the Senate and House and signed into law by the governor April 14, 2009, defines “historical record” as “any record, artifact, object, historical or archaeological site or structure, document, evidence, or public or private writing pursuant to the provisions of title 9, Idaho Code, relevant to the history of the state of Idaho”
- Encourage and promote interest in the history of Idaho (67-4126 [2])
- Collect, preserve, and exhibit artifacts and information illustrative of Idaho history, culture, and society (67-4126 [3])
- Facilitate the use of Idaho records for official reference and historical research (67-4126 [6])
- Be responsible for records management services for state government (67-4126 [7])
- Accept archival material from governments (67-4126 [8])
- Identify historic, architectural, archaeological, and cultural sites, buildings, or districts, and coordinate activities of local historic preservation commissions (67-4126 [14])
- Serve as the Geographic Names Board of the state (67-4126 [15])

Idaho Code 67-46 gives authority to the agency to carry out the preservation and protection of the state’s historic, archaeological, architectural, and cultural heritage resources.

Idaho Code 33-39 provides for the creation of an Idaho Archaeological Survey and designates the State Archaeologist as director.

Idaho Code 27-501 assigns responsibilities to the agency for consultation, determination of appropriate actions, and provision for re-interment of human remains that have been disturbed.

National Historic Preservation Act of 1966, as amended, assigns responsibility to the state historic preservation officer for administration of the National Historic Preservation Program at the state level.

Revenue and Expenditures:

Revenue	FY 2013	FY 2014	FY 2015	FY 2016
General Fund	2,325,100	2,342,200	2,592,200	2,775,900
Federal Grant	1,038,400	705,100	805,800	8,634,000
Miscellaneous Revenue	799,200	716,300	565,600	714,400
Capitol Commission Operating	102,200	98,400	106,900	104,300
Records Center	<u>213,600</u>	<u>213,900</u>	<u>219,500</u>	<u>244,500</u>
Total	\$4,478,500	\$4,075,900	\$4,290,000	12,473,100
Expenditures	FY 2013	FY 2014	FY 2015	FY 2016
Personnel Costs	2,710,400	2,577,000	2,639,300	2,737,600
Operating Expenditures	1,469,600	1,428,100	1,492,700	1,467,900
Capital Outlay	167,100	31,200	213,900	132,100
Trustee/Benefit Payments	<u>147,300</u>	<u>102,700</u>	<u>119,900</u>	<u>128,300</u>
Total	\$4,494,400	\$4,139,000	4,465,800	4,465,900

Profile of Cases Managed and/or Key Services Provided

Cases Managed and/or Key Services Provided	FY 2013	FY 2014	FY 2015	FY 2016
Number of public inquiries: research requests served by Idaho State Archives	*8,612	12,384	13,930	^6,111
Number of public inquiries: research requests served by Idaho State Records Center		#6,749	4,122	4,988
Number of visitors to the Lincoln Legacy exhibition		#2,611	1,976	1,779
Number of paying visitors to the Historical Museum**	31,780	31,700	2,517	N/A
Number of students (K-12) served by educational programs at the Historical Museum**	9,680	12,428	4,513	1,125 Outreach only
Number of students participating in Idaho History Day statewide program	1,433	1,420	1,390	1,400
Sponsored Programming: State Museum (First Thursdays, Museum Comes to Life, Brown Bag Lectures, etc. counted)**	15,465	13,898	2,500	4,315
Number of paying visitors to the Old Pen Site	42,825	50,233	56,766	56,883
Sponsored Programming: Old Pen (National Museum Day counted)	1,193	400	1,565	7,080
SHPO federal project reviews	1,488	1,308	1,227	1,092
SHPO record searches completed	393	333	406	420
SHPO sponsored programming: Archeology Month (est.)	2,450	2,550	2,500	2,220
Visitation at Franklin, Pierce, and Stricker Sites (est.)	4,300	4,000	3,500	4,727

** Denotes museum closed for renovation 2014-2017

* Denotes new method of tracking

Denotes new entry to report

^ FY 2014-2015 Approximately 30 requests per day for active county district court records. Beginning FY 2016 active county district court records were returned to counties

Performance Highlights (Optional)

Part II – Performance Measures

Performance Measure	FY 2013	FY 2014	FY 2015	FY 2016	Current Year	
Goal 1						
<i>Per 67-1904(1)(b)(i), the agency goals to which each measure corresponds should be provided. Replace the text in this box with a goal from the agency's strategic plan and list beneath it any performance measures primarily associated with that goal. Copy this box and insert it as needed to identify additional goals that subsequent performances measures are designed to evaluate.</i>						
1. Number of daily page views on the website (average time spent: 2.5 minutes per user session)	actual	1,812	2,523	2,505	2,281	-----
	benchmark				Maintain/exceed previous fiscal year	Create implement new website & social media plan Increase daily views by 10% (228)
2. Number of paying visitors to Historical Museum (closed 2014-2017 for renovation) and Old Penitentiary (number reflects Old Pen only)	actual	74,605	81,933	59,283	61,254	-----
	benchmark				Maintain/exceed previous fiscal year	Provide and enhance public access to Agency Historic Sites Increase visitor count by 1% (612)

3. Number of federal projects reviewed for compliance with Section 106 and done within 30-day deadline	actual	1,488	1,308	1,227	1,092	-----
	benchmark				100% compliance with federal law	100% compliance with federal law
4. Cubic feet of material added to the State Archives	actual	919	1,850	732	676	-----
	benchmark				In accordance with records retention program standards	In accordance with records retention program standards
5. Cubic feet of material added to the State Records Center	actual		3,488	2,228	2,461	-----
	benchmark				In accordance with records retention program standards	In accordance with records retention program standards
6. Idaho Historical and Archeological Sites added to the Sites Inventory	actual	1,843 (1,107) Archeological sites (736) Historic or architectural sites	1,360 (680) Archeological sites (680) Historic or architectural sites	1,805 (1,229) Archeological sites (576) Historic or architectural sites	1 (762) Archeological sites (650) Historic or architectural sites	-----
	benchmark				In accordance with records retention program standards	In accordance with records retention program standards
7. Idaho Historical and Archeological Sites updated in the Sites Inventory	actual	1033 (700) Archeological sites (333) Historic or architectural sites	697 (520) Archeological sites (177) Historic or architectural sites	1004 (803) Archeological sites (201) Historic or architectural sites	759 (538) Archeological sites (221) Historic or architectural sites	-----
	benchmark				In accordance with records retention program standards	In accordance with records retention program standards
8. Funds invested in preservation programs by local jurisdictions through agency re-granting programs, including Certified Local Governments (CLG); Lewis and Clark; State Historic Records Advisory Board (SHRAB); and Community Enhancement Grant Programs	actual	\$147,300	\$102,694	\$119,956	\$126,567	-----
	benchmark				As required by law or program policy	As required by law or program policy

Performance Measure Explanatory Notes (Optional)

For More Information Contact

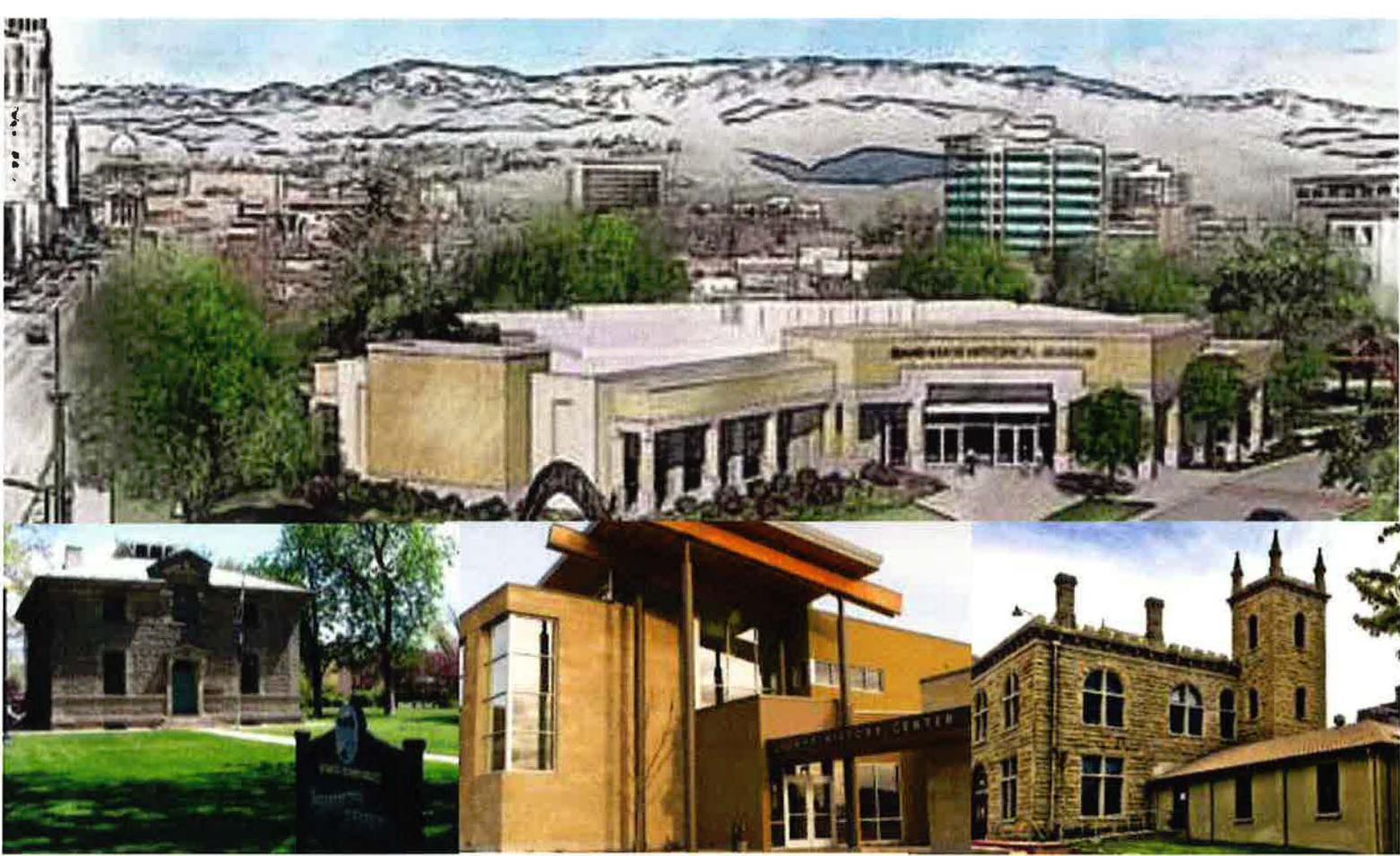
Janet L. Gallimore, Executive Director
Idaho State Historical Society
2205 Old Penitentiary Road
Boise, ID 83712
Phone: (208) 334-2682
E-mail: Janet.Gallimore@ishs.idaho.gov

SEP 01 2016



FY 2018 Budget Request Attachments

- 1) Idaho State Historical Museum Business Plan and Projections
- 2) Statewide Focus Group Findings
- 3) Education Findings
- 4) Focus Group Methodology
- 5) Museum Infographic
- 6) Value of History Statement



IDAHO STATE HISTORICAL MUSEUM

Business Plan and Projections – Final Report

August 2016

Lord Cultural Resources is a global professional practice dedicated to creating cultural capital worldwide.

We assist people, communities and organizations to realize and enhance cultural meaning and expression.

We distinguish ourselves through a comprehensive and integrated full-service offering built on a foundation of key competencies: visioning, planning and implementation.

We value and believe in cultural expression as essential for all people. We conduct ourselves with respect for collaboration, local adaptation and cultural diversity, embodying the highest standards of integrity, ethics and professional practice.

We help clients clarify their goals; we provide them with the tools to achieve those goals; and we leave a legacy as a result of training and collaboration.

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EXECUTIVE SUMMARY

Lord Cultural Resources was engaged by the Idaho State Historical Society (the Agency) to prepare a business plan and projections for the Idaho State Historical Museum (ISHM) in the context of its revitalization and reopening in about December 2017. Some of the recommendations are specific or applicable to other Agency sites. The analyses and projections were based on contextual, comparables and market analyses, site tours, workshops and interviews in Boise, and the judgment and experience of the consultants.

The report sets out 46 recommendations/assumptions intended to help increase attendance and revenues and to control operating costs and were grouped into 10 different categories. Among the most important recommendations/assumptions are the following points, with more detail and explanations or rationale in the body of the report:

- Name of the Museum:** Eliminate the term “historical” as no longer adequate to convey what the new museum will be about and that is tied to an “historical society” term increasingly perceived as elitist and antiquated. Although “history” would be preferred to “historical” we believe that term also has its limitations. The recommended name for the new museum is “Idaho State Museum” (ISM).
- A Higher Quality Visitor Experience Merits Increased Admission Charges:** Free or low cost admission would be unfair to other museums and related institutions in the Julia Davis Park area and in Boise generally because the ISM will continue to have access to state operating funds not available to most other museums and related institutions. Recommended charges are as follows for the reopening five years of operation.

	Year 1-2	Years 3 -5
Adult (25-61)	\$10.00	\$11.00
Senior (62+)	\$8.00	\$9.00
Youth (13-24)	\$8.00	\$9.00
Child (3-12) and Veterans	\$5.00	\$6.00
Weekday Afternoon (all visitors after 2 p.m.)	\$5.00	\$6.00
Non-School Group	\$7.00	\$8.00
School Group	\$0.00	\$0.00
Indirect Paid/Unpaid	\$0.00	\$0.00

- The admission charge associated with the major level exhibition is assumed to be a \$5.00 surcharge in all ticket categories**, including otherwise free admission categories. Only members and VIPs will receive free admission. This is assumed to be applicable over a 4-month period in Year 4 of the projections.

- **Offer lower level membership in the "Idaho State Museums"** to include the ISM and the Old Pen and other Agency sites whether or not they charge admission. Upper level membership should remain in the Society to reflect the exclusivity sought by many upper level members. We recommend that upper level members at the \$500 or higher level be credited with a tax receipt for guest passes to be distributed in their name to those in financial need through social service agencies, religious institutions and schools. If used for their own purposes a tax receipt would not be available.
- **Pursue Plans to Focus on Facility Rentals and Events:** New history museums are positioning themselves as popular venues for evening and other rentals, long enjoyed by art museums. Plans for the reopened facility that should enhance the attractiveness of the ISM for evening rentals include an historic oak bar, stained glass dome and historic piano that will be functional.
- **Continue to Offer Discounted Rental Rates to State Government Agencies.** This recognizes the reality that the State of Idaho is the primary capital and operating funder of the ISM.
- **Introduce a Weekday Afternoon Strategy to Target Seniors.** A weekday afternoon strategy offers an opportunity to visit for seniors, the unemployed and others with available time to attend. The strategy requires communicating that weekday afternoons are quiet times in the museum, that a substantial discount price is offered and that free demonstrations and tours are available as well as programs of interest. Sponsorship should be sought for the program as one of the items on the recommended menu of sponsorship opportunities.
- **A Major Level Exhibition should be brought to the Museum only every Third Year.** This recognizes the reality of the high cost of most major exhibitions and the staff and other resources that must be allocated to the planning and implementation of such exhibitions. This also recognizes that the Museum of Idaho focuses on such major exhibitions and that some lenders would consider Idaho Falls and Boise to be too close together, even though they are five hours drive apart.
- **Create a Menu of Sponsorship Opportunities:** An increasing number of museums have implemented an actual first come, first served menu of sponsorship opportunities that would go beyond requests from larger funders and create opportunities for smaller sponsorship opportunities. Such sponsorship opportunities would be posted on the web site, and distributed in hard copy to known existing and potential supporters. The concept of the menu of sponsorships leads to implementation of programs that are sponsored and to a determination by senior management of the Agency of which other menu items should be supported for mission-related reasons from general revenues.
- **Provide an Orientation Role to other Museums/Sites throughout the State, whether or not they are Agency Sites:** Of particular importance would be to provide an orientation role to Native American sites that are of particular interest to international tourists. Tribes with casinos might be potential funders of the reopened ISM.
- **Increase ISM Museum staff from 9 FTE (full-time equivalent) to 18 FTE.** In Year 4, the implementation of a 4-month major exhibition will require additional part-time staff, bringing the total to 20.0 FTE that year.
- **Increase Agency staff by 3 FTE or 3.5 FTE in Year 4 for the major exhibition.**

The following table summarizes our projections of attendance, operating revenues and costs for the Idaho State Museum (ISM) in the initial five years of operation of the reopened and substantially enhanced facility. Attendance levels are estimated to grow from the base level of under 40,000 visitors in the last full year of operation to 115,000 visitors in the opening year of the new ISM. This will be followed by a common attendance decline in the next two years until an assumed major temporary exhibition in Year 4 helps to restore the attendance to opening year levels. There will then be a common decline to the 90,000 visitor range.

The total operating annual budget, in 2017 dollars, of the ISM is projected to grow from about \$717,000 in FY2014 to the \$2.0 million range except in Year 4 when when higher costs associated with the major temporary exhibition cause the operating budget to increase to over \$2.5 million. As is common with museum expansions and enhancements, the staffing and other operating expenses will increase far more substantially than will the earned income that may be generated. To offset these higher costs, three key assumptions have been identified that will allow for a generally breakeven operation. The first is that the cash amount provided by the state of Idaho will be maintained at FY2014 levels. The second is that the state will absorb the building occupancy costs of the state-owned ISM, and the third is that private funding support will pay for the non-staff exhibition costs of the Museum. Based on these assumptions the projections indicate close to a breakeven operation each regular year, and a small surplus in Year 4 assuming more private funding for the major exhibition.

Summary of Projections (rounded)	Base	Year 1	Year 2	Year 3	Year 4	Year 5	Year 1 Year 2 Year 3 Year 4 Year 5					
							Base	%	%	%	%	%
Total On-Site Attendance	39,600	115,000	100,000	95,000	115,000	90,000						
Projected Operating Revenues												
Regular Admissions Revenue	\$69,100	\$545,445	\$474,300	\$507,015	\$613,755	\$480,330	9.8%	27.2%	24.0%	25.2%	23.9%	23.9%
Major Exhibition Surcharge	\$0	\$0	\$0	\$0	\$125,000	\$0	0.0%	0.0%	0.0%	0.0%	4.9%	0.0%
Retail Sales	\$45,400	\$161,000	\$141,400	\$135,673	\$165,878	\$131,116	6.4%	8.0%	7.2%	6.7%	6.5%	6.5%
Rentals	\$8,000	\$82,500	\$100,980	\$111,583	\$113,815	\$125,021	1.1%	4.1%	5.1%	5.5%	4.4%	6.2%
Membership (Agency Wide)	\$16,100	\$172,500	\$163,800	\$156,000	\$187,500	\$163,800	2.3%	8.6%	8.3%	7.8%	7.3%	8.1%
Public and Educational Programs	\$6,500	\$54,545	\$47,430	\$50,702	\$61,376	\$48,033	0.9%	2.7%	2.4%	2.5%	2.4%	2.4%
Other Earned Income	\$0	\$10,000	\$20,000	\$20,000	\$25,000	\$20,000	0.0%	0.5%	1.0%	1.0%	1.0%	1.0%
Assumed Private Offset of Exhibition Costs		\$120,000	\$150,000	\$152,000	\$355,000	\$155,000	0.0%	6.0%	7.6%	7.6%	13.8%	7.7%
Assumed State Offset of Occupancy Costs		\$293,700	\$312,396	\$317,070	\$355,766	\$326,418	0.0%	14.7%	15.8%	15.8%	13.9%	16.2%
Existing State Support	\$562,600	\$562,600	\$562,600	\$562,600	\$562,600	\$562,600	79.5%	28.1%	28.5%	28.0%	21.9%	28.0%
Total Projected Revenues	\$707,700	\$2,002,290	\$1,972,906	\$2,012,643	\$2,565,690	\$2,012,318	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Projected Operating Expenses (excluding depreciation)												
Salaries, Wages, Benefits	\$542,800	\$1,177,000	\$1,183,515	\$1,189,964	\$1,301,921	\$1,201,886	75.7%	57.8%	58.5%	58.5%	51.8%	58.7%
Occupancy	\$72,300	\$293,700	\$312,396	\$317,070	\$355,766	\$326,418	10.1%	14.4%	15.4%	15.6%	14.1%	15.9%
Exhibitions	\$26,000	\$120,000	\$150,000	\$152,000	\$355,000	\$155,000	3.6%	5.9%	7.4%	7.5%	14.1%	7.6%
Programs	\$10,000	\$109,089	\$94,860	\$101,403	\$122,751	\$96,066	1.4%	5.4%	4.7%	5.0%	4.9%	4.7%
Collections Care	\$3,700	\$20,000	\$15,000	\$15,000	\$15,000	\$15,000	0.5%	1.0%	0.7%	0.7%	0.6%	0.7%
General & Administrative	\$10,000	\$117,700	\$94,681	\$95,197	\$130,192	\$96,151	1.4%	5.8%	4.7%	4.7%	5.2%	4.7%
Retail Cost of Goods Sold	\$32,800	\$88,550	\$77,770	\$74,620	\$91,233	\$72,114	4.6%	4.4%	3.8%	3.7%	3.6%	3.5%
Marketing	\$19,600	\$109,250	\$95,000	\$90,250	\$143,750	\$85,500	2.7%	5.4%	4.7%	4.4%	5.7%	4.2%
Total Projected Expenses	\$717,200	\$2,035,289	\$2,023,222	\$2,035,504	\$2,515,613	\$2,048,135	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Surplus/ (Deficit)	(\$9,500)	(\$33,000)	(\$50,316)	(\$22,861)	\$50,076	(\$35,817)	-1.3%	-1.6%	-2.5%	-1.1%	2.0%	-1.7%

1. INTRODUCTION

This chapter summarizes the background to and purpose of this business planning and projections study for the Idaho State Historical Museum (ISHM) in the context of its revitalization and reopening in about December 2017. The chapter also summarizes the study scope of work and methodology.

1.1 BACKGROUND TO AND PURPOSE OF THIS STUDY

The Idaho State Historical Museum (ISHM) is part of a state museum and historic site system that is administered by the Idaho State Historical Society. The Society was created in 1891 and established as an agency of the state in 1907. The current mission statement of the Society, as developed in the 2016-21 Strategic Plan, is to **“preserve and promote Idaho’s cultural heritage.” Its associated 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 and to inform and influence the future.” The values of the Society relate to customer (visitor) service, stewardship, education and professionalism.**

It has long been recognized that to better achieve the mission of and vision for the ISHM, its aging infrastructure dating from 1950 requires repairs. There has also long been recognition of the need to expand and enhance the exhibitions and other aspects of the visitor experience. Plans for architectural renovations and for exhibition design have been completed but the Society also requires operational and business planning to consider such issues as admission charges, the membership program and staffing needs in the context of the reopening Museum as well as strategies and recommendations to increase attendance and revenues and control operating costs primarily for the ISHM but also for other Agency assets in Boise. These include the Old Idaho Penitentiary and the Idaho History Center, which includes the Idaho State Archives and State Records Center, as well as administrative offices and two modest exhibition spaces. The Society also requires credible projections of attendance, operating revenues and expenses for the opening five years of operation of the ISHM assuming implementation of the approved recommendations or assumptions.

After a competitive bidding process the Society selected Lord Cultural Resources to conduct the business planning and projections study. Lord Cultural Resources is the **world’s** largest museum planning firm with substantial experience in conducting similar studies. The study is led by Ted Silberberg, the Senior Principal responsible for Market and Financial Planning, supported by historian Dr. Brad King, a Vice President with the firm, and research consultant Maureen Marshall.

1.2 SCOPE OF WORK AND METHODOLOGY

To meet the study's objectives the consultants carried out the following work elements. We:

- Reviewed and analyzed background material provided to us as well as additional data that we gathered.
- Toured the ISHM site and facilities and areas around it as well as the Idaho History Center and the Old Idaho Penitentiary.
- Facilitated an Assumptions Workshop with Board and staff of the Society. The objective was to understand fixed assumptions and to identify preliminary business planning options and recommendations to be explored in subsequent interviews. Please see Appendix A for a list of Workshop attendees.
- Conducted interviews with other stakeholders, potential funders and market-knowledgeable persons to better understand opportunities and constraints and to further develop and test operational or business planning ideas and options. Please see Appendix A for those interviewed.
- Analyzed available data regarding history museums within the overall museums marketplace and basic published data regarding all 50 state history museums in the country. We also conducted primary research with three of six history museums identified to offer particularly useful comparability to the ISHM and participated in the study. The objectives were to establish realistic market, operational and financial parameters for the ISHM. This analysis is set out in Chapter 2.
- Considered the experience of and benchmarks from other selected museum-related institutions in Boise, particularly those in Julia Davis Park. This analysis is also found in Chapter 2.
- Analyzed data and interview feedback regarding existing markets for the pre-closing ISHM operation, the Old Idaho Penitentiary and the Lincoln exhibition in the Idaho History Center. We also analyzed potential resident, school and tourist markets for the Boise, all set out in Chapter 3.
- Developed recommendations for the Society to help meet the objectives of this study. These are set out in Chapter 4. Approved or modified recommendations will become assumptions that will form the basis of the attendance, operating revenue and expense projections for the ISHM.
- Prepared a Phase 1 Report, which was reviewed at a Board meeting on June 21, 2016 with subsequent additional feedback to finalize the recommendations/ assumptions that became the basis for the attendance, operating revenue and expense projections which were added in a Draft Final Report.
- Modified the Draft Final Report and added an Executive Summary in this Final Report document.

Bold italics are used throughout the document to highlight key findings, conclusions and recommendations.

2. CONTEXTUAL AND COMPARABLES ANALYSES

It is essential that the attendance and financial projections for the Idaho State Historical Museum be based on realistic expectations that emerge from consideration of benchmarks for history and other museum types within the overall museums marketplace as well as the experience of other Museums in Boise and other comparable museums in other states. This chapter sets out those contextual and comparables analyses.

2.1 CONTEXTUAL ANALYSIS

To establish a realistic context for consideration of the prior or existing financial performance of the Idaho State Historical Museum (ISHM) and Old Idaho Penitentiary and opportunities for the future this section considers data from the comprehensive 2009 survey of the American Alliance of Museums (AAM) and a 2013 comparison of various museum types.

2.1.1 History, **Children's**, Natural History and Specialized Museums within the Overall Museums Marketplace

The ISHM has been a largely cultural history museum, but plans for the future include natural history as well. In addition it is to include a creative **children's gallery**. The Old Idaho Penitentiary is a combination specialized and history museum. The data that follow are from the latest comprehensive survey of the American Alliance of Museums (AAM), which took place in 2009 and has comparisons to 2006. The AAM has not allocated funds for another comprehensive survey, instead requesting members to upload data, and the resulting sample sizes are insufficient for meaningful comparative analyses. We believe the 2009 data are nonetheless still generally relevant for the purposes of this study.

- **Attendance:** The average museum reported about 26,500 visitors compared to about 33,400 in the 2006 survey, with the decline reflecting the addition of a substantial number of smaller new museums. Overall museum attendance continues to increase. The median figure for history museums is only 10,000 but this is because there are many small, underfunded community history museums across the country. Specialized museums tend to have a narrower enthusiast market but the uniqueness of and fascination associated with a penitentiary museum helps to explain why the relatively isolated Old Pen attracts more visitors than did the well-located ISHM before it closed. ***Noteworthy is the higher attendance reported by natural history museums and children's museums, which represent a positive indicator of substantially higher attendance for the ISHM when it reopens.***
- **Admission Charges:** As shown later in this chapter, some state history museums offer free admission but the trend has been to charging. The ISHM offered free admission until 20 years ago. As shown on the following table, some 41% of all US museums (51% for history, 43% specialized, 37% for natural history and only 6% of natural history museums) offer free admission to all visitors. ***This report does not recommend free admission for the ISHM for reasons set out in Chapter 4.***
- **Sources of Operating Income:** The average museum generates about 28% of its operating income from earned sources, 37% from private sources, 12% from endowments and 24% from government sources. History museums generate somewhat lower than average income from earned sources **while natural science, children's and specialized museums report higher than average earned income.** ***State history museums, including the Idaho State Historical Museum, experience a greater level of difficulty in achieving private support precisely because they are state institutions and often believed to be entirely state funded.***
- **Staff Salaries as a Percentage of Total Operating Costs:** Salaries and wages account for an average of 50% of the operating budgets of museums in general. History, **children's and natural history museums all report higher than average allocations for staffing while specialized museums tend to allocate a lower percentage.** ***Staffing costs will remain the largest single operating cost for the ISHM in the future.***
- **Collections Care as a Percentage of Total Operating Costs:** One of the realities faced by the Idaho State Historical Museum, and the Agency as a whole, is the high cost of fulfilling its collections care responsibilities for which there is little revenue return. History museums allocate close to 9% of their operating budget to collections care while for natural history museums it is close to 18%. ***The opening of the revitalized ISHM will not change the need for substantial investment in staffing and other resources to meet the collections care responsibilities of the Agency.***
- **Marketing Costs:** Although digital and social media have generally reduced the financial allocations for traditional advertising and promotion, it will be essential for the revitalized ISHM to have an adequate marketing budget. This is particularly important given the geography of Idaho. The median for museums is 4.1% of the operating budget and \$1.29 per visitor. History museums, including the ISHM, have allocated much less. ***A substantially increased marketing budget will certainly be required for the reopened ISHM.***

Profiles of Museums in the United States (median figures)	Art Museum	Children's or Youth Museum	General Museum	Historic Home or Site	History Museum or Historical Society	Living Collections	Natural History or Anthropology	Science or Tech	Specialized Museum	Overall 2009 Survey	Overall 2006 Survey
Sample Size	156	18	71	89	190	17	32	25	73	671	809
Attendance	44,878	130,870	58,500	11,700	10,000	208,574	58,176	357,103	22,000	26,500	33,446
% Charging Admission Fees	47.6%	94.1%	63.2%	77.4%	49.2%	64.3%	63.3%	96.0%	57.1%	59.0%	60.7%
Adult Admission Charge	\$8.00	\$7.50	\$7.00	\$6.00	\$5.00	\$8.00	\$8.00	\$10.00	\$7.00	\$7.00	\$6.00
Operating Income	\$2,379,176	\$1,729,532	\$1,930,895	\$350,000	\$260,000	\$3,072,452	\$3,256,810	\$7,857,138	\$602,080	\$1,168,559	\$850,000
Earned Revenues	21.5%	48.3%	24.8%	31.7%	24.0%	30.0%	31.1%	48.8%	33.2%	27.6%	31.0%
Revenues from Private Donors	46.6%	27.8%	33.7%	34.6%	31.0%	20.3%	38.3%	28.9%	37.7%	36.5%	35.2%
Revenues from Investment Sources	18.6%	12.1%	8.8%	10.7%	8.5%	14.3%	6.4%	3.0%	9.3%	11.5%	9.6%
Revenues from Government Sources	13.3%	11.7%	32.6%	23.0%	36.4%	35.4%	24.2%	19.3%	19.9%	24.4%	24.1%
Value of Endowment	\$9,744,500	\$414,875	\$2,539,870	\$1,202,817	\$526,500	\$14,253,806	\$5,078,964	\$1,829,599	\$2,526,508	\$2,825,075	\$1,580,537
Earned Income per Visitor	\$8.21	\$6.31	\$7.16	\$9.44	\$4.39	\$4.87	\$6.76	\$11.14	\$10.00	\$7.22	\$5.91
Operating Expenses	\$2,317,675	\$2,522,615	\$1,798,754	\$298,200	\$262,206	\$3,630,530	\$3,237,600	\$6,827,362	\$778,859	\$1,166,000	\$829,037
Operating Cost per Visitor	\$49.94	\$15.07	\$30.21	\$28.33	\$26.73	\$15.10	\$29.74	\$20.95	\$32.25	\$31.40	\$23.35
Staff Salaries as a % of Total Expenses	48.6%	54.5%	53.5%	56.0%	50.8%	63.9%	60.8%	45.8%	39.9%	49.9%	50.9%
Collections Care as a % of Total Expenses	6.4%	4.1%	9.9%	4.9%	8.5%	26.7%	17.3%	1.2%	10.0%	8.0%	9.4%
Marketing Budget as a % of Total Expenses	4.4%	8.4%	5.4%	3.8%	2.2%	4.1%	4.5%	7.5%	4.0%	4.1%	4.4%
Marketing Expenses Per Visitor	\$2.15	\$0.93	\$1.61	\$1.14	\$0.50	\$0.85	\$1.22	\$1.32	\$1.00	\$1.29	\$1.05

Source: 2009 Museum Financial Information, American Association of Museums, 2009

More recent **comparative data for larger sized museums** were prepared by the Morey Group, as seen on the following table. It was based on a survey of 253 generally larger museums and related institutions. The data confirm the more substantial attendance levels achieved by larger history museums but also that they tend to attract fewer memberships than other museum types. *Noteworthy as well is that the child admission price of history museums tends to be lower as a percentage of the adult charge compared to other types of museums. The data suggest that the introduction of a children's gallery and additional natural history components should enable a higher child admission charge and the ability to charge children at a younger age than the previous six years old when the revitalized museum reopens.*

Comparative Data by Museum Type, 2013	Reported Attendance	Adult Price	Child Price	Child Price as % of Adult	Memberships	Memberships as % of Attendance
Art Museums	291,346	\$12.55	\$7.13	56.8%	13,789	4.7%
Aquariums	762,679	\$19.90	\$13.68	68.7%	17,132	2.2%
Botanical Gardens/Arboretums	468,793	\$10.56	\$6.35	60.1%	13,088	2.8%
Children's Museum	360,661	\$11.48	\$10.76	93.7%	7,729	2.1%
History Museum	398,672	\$11.91	\$7.26	61.0%	5,055	1.3%
Science Museum/Center	920,829	\$14.66	\$10.68	72.9%	9,431	1.0%
Zoo	959,894	\$15.04	\$10.74	71.4%	32,664	3.4%
Other Museum Types	278,864	\$13.59	\$7.88	58.0%	7,832	2.8%
Average for All	660,224	\$13.71	\$9.31	67.8%	13,340	2.6%
Median for All	433,733	\$13.07	\$9.28	64.9%	11,260	2.5%

Morey Group, 2014. Sample size of 253 and generally larger institutions

2.1.2 Benchmarks from Other State History Museums

The only available published source of data for all state history museums is the *Official Museum Directory of the American Alliance of Museums*. It is published by a private company and it is well known that not all of the data reported by museums are accurate or up to date.

- **Admission Charge Basis:** Excluding the museums not open to the public, including the ISHM, *19 offered free admission to all visitors, down from 29 in 2002. This reflects a trend to charged admission for state history museums as more are modernized.* Higher admission charges are reported by those that have been upgraded including those in Texas, Colorado, Indiana, Minnesota, and Washington. However, issues of access for those in lower income and education categories also need to be kept in mind when recommending appropriate admission charges for the ISHM.
- **Admission Charges:** Among charged admission museums the average and median adult admission charge figures are relatively low at \$7.05 and \$7.00, respectively. Specific recommendations for the revitalized ISHM are set out in Chapter 4.
- **Reported Attendance:** Not surprisingly, the reported attendance levels are higher for free admission state museums than for those that charge. In 2014 the average free admission museum reported close to 207,000 visitors while the average charged admission state museum reported about 175,000 visitors. The average figures are skewed by very high attendance levels at a few of the museums. The median figures are much lower. Noteworthy as well the average attendance levels have increased over the years but the median has varied. *The data confirm the likelihood that the revitalized ISHM will attract substantially more visitors than when it closed to the public in 2014.*

- **Family Membership Charge:** Many state history museums do not report a membership program or a family membership charge in particular. For those with a family membership charge the amount is only slightly higher for charged admission relative to free admission state museums. *The data indicate that there are many persons who become members not to seek value for money in unlimited free admission or other discounts but rather because of support of the mission of the museum, because of pride in the city or state or other altruistic reasons.*
- **Theater Facility:** Reflecting that most are relatively small only 19 of the 50 state museums reported having theater facilities. These contribute to higher attendance levels and are generally found in larger museums and those that charge admission.
- **Full-Time and Part-Time Employees:** The average for charged admission state museums is about 57 staff compared to 41 for free admission museums. Median figures are much lower, including lower figures for the ISHM of 9 full-time staff. Similar patterns are seen for part-time staff.
- **Days Open:** Some 17 of the 50 state museums are open to the public for seven days per week, 15 for five days and the remaining 18 for six days per week. The norm in the field, particularly for medium sized and smaller museums, is to remain closed for one day per week to allow maintenance to take place on that day.
- **Evening Openings:** Only five of the 50 report a regular evening opening per week. Our recommendation regarding this for the revitalized ISHM is set out in Chapter 4.

Published Data for State Museums											
Name of Museum	Year Founded	Reported Attendance 2002	Reported Attendance 2012	Reported Attendance 2014	Fixed Admission Charge (Adult)	Family Membership Charge	FT Staff	PT Staff	Theatre (Y/N)	Days/Wk (majority of months)	Evening (Y/N)
Alabama Dept. of Archives & History	1901	46,000	50,000	50,000	\$0.00	N/A	40	4	N	6	N
Alaska State Museum (closed in 2014)	1900	65,604	60,000	60,000	\$7.00	\$50.00	11	3	N	5	N
Arizona Capitol Museum	1974	76,372	60,000	60,000	\$0.00	N/A	10	5	N	6	N
Historic Arkansas Museum	1941	50,000	50,000	60,000	\$2.50	\$50.00	21	20	N	7	N
California State Capitol Museum	1981	513,000	513,000	513,000	\$0.00	N/A	23	19	Y	7	N
Colorado Historical Society	1879	387,114	229,509	229,509	\$12.00	\$80.00	122	14	Y	7	N
Connecticut Historical Society	1825	36,420	60,000	60,000	\$8.00	\$50.00	17	10	Y	5	N
Delaware Historical Society, Wilmington	1864	106,164	60,000	40,000	\$7.00	\$65.00	15	36	N	4	N
Museum of Florida History	1967	160,759	62,862	62,862	\$0.00	\$60.00	22	8	Y	7	Y (3rd Thurs of
Georgia Capitol Museum	1895	60,000	60,000	60,000	\$0.00	N/A	3	0	N	5	N
Hawaii State Capitol	1969	N/A	N/A	N/A	\$0.00	N/A	N/A	N/A	N	5	N
Idaho State Historical Museum (closed in 2014)	1881	190,000	190,000	190,000	N/A	N/A	8	6	Y	N/A	N
Illinois State Museum	1877	392,459	374,122	323,650	\$0.00	\$50.00	N/A	N/A	N	7	N
Indiana State Museum & Historic Sites	1869	189,000	325,000	325,000	\$13.00	\$75.00	110	25	Y	7	N
State Historical Museum of Iowa	1892	95,000	51,000	90,000	\$0.00	N/A	N/A	N/A	N	7	N
Kansas Museum of History	1875	120,557	52,202	53,501	\$6.00	\$60.00	11	2	N	6	N
Kentucky Historical Society	1836	228,000	70,000	70,000	\$4.00	N/A	54	5	N	5	N
Louisiana State Museum, New Orleans (several sites)	1906	229,482	308,616	308,616	\$6.00	\$35.00	72	0	Y	6	N
Maine State Museum	1837	90,839	49,023	49,032	\$2.00	\$40.00	15	11	N	5	N
Maryland Historical Society, Baltimore	1844	105,000	18,000	18,000	\$6.00	\$65.00	24	12	N	5	N
Massachusetts Commonwealth Museum	1986	10,000	10,000	8,750	\$0.00	N/A	3	2	N	5	N
Michigan Historical Museum	1879	164,154	150,000	87,574	\$6.00	\$50.00	18	4	N	7	N
Minnesota Historical Society	1849	1,100,000	1,000,000	1,000,000	\$12.00	\$75.00	360	260	Y	6	Y (Tues)
Museum of Mississippi History (closed in 2014)	1957	68,000	40,000	N/A	N/A	N/A	10	0	N	N/A	N
Missouri State Museum	1919	200,000	458,746	458,746	\$0.00	N/A	10	15	N	7	N
Montana Historical Society	1865	90,000	40,256	40,256	\$5.00	\$60.00	50	14	N	6	Y (Thurs)
Nebraska History Museum	1878	138,207	N/A	N/A	\$2.00	\$55.00	17	4	Y	7	N
Nevada State Museum	1939	80,012	30,624	38,983	\$8.00	\$60.00	17	4	N	6	N
New Hampshire Historical Society	1823	48,492	23,189	23,189	\$7.00	N/A	14	19	Y	5	N
New Jersey State Museum	1895	335,000	300,000	300,000	\$0.00	\$60.00	26	10	Y	6	N
Museum of New Mexico	1909	71,513	642,100	642,100	\$9.00	\$90.00	N/A	N/A	N	7	Y (Fri)
New York State Museum	1858	650,000	719,205	719,205	\$0.00	N/A	N/A	N/A	N	6	N
North Carolina Museum of History	1902	256,000	324,000	342,000	\$0.00	\$75.00	144	5	Y	7	N
State Historical Society of North Dakota	1895	100,000	100,000	250,000	\$0.00	\$45.00	78	40	N	7	N
Ohio Historical Society (Ohio History)	1885	431,697	440,000	440,000	\$10.00	\$55.00	162	24	Y	5	N
Oklahoma Historical Society	1893	65,000	415,377	297,543	\$7.00	N/A	144	45	N	6	N
Oregon Historical Society	1898	40,000	40,000	40,000	\$11.00	\$80.00	35	24	N	7	N
State Museum of Pennsylvania	1905	295,637	300,000	300,000	\$7.00	N/A	N/A	N/A	Y	5	N
Rhode Island Historical Society	1822	49,196	30,000	30,000	\$5.00	N/A	14	21	N	6	N
South Carolina Historical Society	1855	3,500	3,500	3,500	\$5.00	N/A	7	4	N	5	N
South Dakota State Historical Society	1901	20,463	19,899	19,899	\$4.00	\$45.00	43	6	N	7	N
Tennessee State Museum	1937	149,844	175,000	180,000	\$0.00	\$50.00	50	0	N	6	N
Bullock Texas State History Museum	2003	N/A	500,000	500,000	\$12.00	\$75.00	N/A	N/A	Y	7	N
Utah State Historical Society	1897	75,000	75,000	75,000	\$0.00	N/A	N/A	N/A	N	5	N
Vermont Historical Society Museum	1838	18,000	18,000	18,000	\$5.00	\$50.00	13	7	N	6	N
Virginia Historical Society Museum	1831	70,000	60,000	60,000	\$0.00	\$72.00	62	13	Y	7	N
Washington State History Museum, Tacoma	1891	120,000	81,670	81,670	\$11.00	\$75.00	N/A	N/A	Y	6	Y (Thurs)
West Virginia State Museum	1894	182,000	120,000	120,000	\$0.00	N/A	96	3	Y	5	N
Wisconsin Historical Museum	1846	77,664	79,500	72,500	\$5.00	N/A	N/A	N/A	Y	5	N
Wyoming State Museum	1895	60,000	25,000	45,000	\$0.00	N/A	10	2	N	6	N
Average for All Museums	1893	168,982	184,675	187,598	\$4.26	\$60.41	49.0	17.7	-	6.0	-
Median fo All Museums	1894	97,500	66,431	72,500	\$4.50	\$60.00	21.5	7.5	-	6.0	-
Average for Free Admission Museums	1913	191,645	199,360	206,567	\$0.00	\$58.86	41.2	9.0	-	6.2	-
Median for Free Admission Museums	1901	149,844	100,000	105,000	\$0.00	\$60.00	24.5	5.0	-	6.0	-
Average for Charged Admission Museums	1876	151,355	173,254	175,317	\$7.05	\$60.24	56.9	25.0	-	5.9	-
Median for Charged Admission Museums	1877	90,000	60,000	60,000	\$7.00	\$60.00	19.5	12.0	-	6.0	-

Source: 2015 Official Museum Directory of the American Alliance of Museums. Data are as reported and not always updated or accurate. N/A items are excluded from average and median calculations

2.1.3 Overview of Other Museums in Idaho

The following table is from the 2015 Official Directory of the American Alliance of Museums and, excluding the Idaho State Historical Museum and Old Idaho Penitentiary, focuses on 17 museums that report at least 20,000 annual visitors. They are listed in alphabetical order and help to provide benchmarks for the revitalized ISHM. Seven are categorized as history museums and two are natural history museums. It must be emphasized that the data are as reported by the museums and not always accurate or updated. Among the data of note for the revitalized ISHM are the following points:

- **Admission Charges:** The highest adult admission charge is \$10, reported by both the Boise Zoo and the Discovery Center, also in Boise. It is \$8 for the Museum of Idaho in Idaho Falls. Other charges are lower, leading to average and median figures in the range of only \$5. Substantial discounts are offered to children. Three sites charge per vehicle and three offer free admission at wildlife or nature parks. The recommended adult admission charge for the revitalized ISHM set out in Chapter 4 will take these benchmarks into account.
- **Attendance Levels:** Among the charged admission institutions, the highest attended are the zoos in Boise and Idaho Falls. Of particular note is the 100,000 visitors reported by the Museum of Idaho, which is the closest in terms of concept to the plans for the revitalized ISHM. However, it has a strong emphasis on major traveling exhibitions that tend to skew attendance figures higher and also require a substantial investment to pay for them. The Boise Art Museum reported about 49,000 visitors in its facility across the street from the ISHM. Please see additional discussion of the other major museum-related institutions in Boise and the Museum of Idaho later in this chapter.
- **Operating Days and Hours:** A common practice in Idaho is additional days and hours during the summer months when it is light until very late in the evening and to take into account frequent very high daytime temperatures. On the other hand the evenings is when museums are able to generate most of their rental income. These issues are taken into account in the recommended open hours set out in Chapter 4.
- **Staff Levels and Volunteers:** The staff levels vary widely and will be considered in the staffing assumptions for the ISHM, recognizing the statewide and collections care mandates of the ISHM require higher staff levels. *Of particular interest are the substantial volunteer levels reported by some of the institutions. These are positive indicators for a much more substantial volunteer program for the revitalized ISHM.*

Other Museums in Idaho Reporting at Least 20,000 Annual Visitors

Museum	Location	Type	Adult Admission Charge	Child Admission Charge	Other Admission Charges	Reported Attendance	Hours	Evening Hours (After 6 pm)	Full-Time Staff	Part-Time Staff	Volunteer Staff
Boise Art Museum	Boise	Art	\$6.00	\$3.00		49,343	Tuesday-Saturday 10-5, Sunday 12-5	First Thursdays, 10 am-9 pm	14	15	280
Coeur d'Alene's Old Mission State Park	Cataldo	History			\$5 per vehicle	90,000	April-October: Daily 9-5; November-March: Daily 10-3				
Craters of the Moon National Monument and Preserve	Arco	Natural History			\$8 per vehicle	217,000	Memorial Day-Labor Day: Daily 8-6; September-May: Daily 8-4:30				
Deer Flat National Wildlife Refuge	Nampa	Zoo	\$0.00	\$0.00		170,000	Park: Daily Daylight Hours; Visitor Center: Monday-Friday 8-4, Saturday 10-4				
Herrett Center for Arts & Science, Faulkner Planetarium and Centennial Observatory	Twin Falls	Art, Science, Planetarium	\$6.00	\$4.00		60,000	Tuesday & Friday 9:30-9, Wednesday-Thursday 9:30-4:30, Saturday 1-9	Tuesday, Friday, Saturday: Open until 9	7	4	4
Idaho Botanical Garden	Boise	Garden	\$5.00	\$3.00		120,000	Summer: Monday, Wednesday, Thursday 9-5, Tuesday & Friday 9-9, Saturday & Sunday, 10-6; Winter: Monday-Friday 9-5	Summer Tuesdays & Fridays: Open til 9	16	15	586
Kootenai National Wildlife Refuge	Bonniers Ferry	Zoo	\$0.00	\$0.00		20,000	Refuge: Daily Dawn-Dusk; Office: Monday-Friday 7:30-4:00				
LDS Temple Visitor Center	Idaho Falls	History	\$0.00	\$0.00		50,000	Center: Daily 9-9; Grounds: Summer daily	Daily: Open til 9			
Massacre Rocks State Park	American Falls	History			\$4 per vehicle	50,000	Visitor Center: May 15-September 15, Daily 7:30am-9pm; Park: Summer Daily 8:30-8:30; Sept.-June Daily 7-3:30	Summer: Center open until 9, Park open until 8:30	3	0	0
Morrison Knudsen Nature Center, Idaho Department of Fish & Game	Boise	Natural History	\$0.00	\$0.00		150,000	Park: Daily sunrise to sunset. Visitor Center: Tuesday-Friday 9-5, Saturday & Sunday 11-5		3	5	400
Museum of Idaho	Idaho Falls	History	\$8.00	\$7.00		100,000	Monday & Tuesday 9-8, Wednesday-Saturday 9-5	Monday & Tuesday: Open until 8:00	9	1	250
Nez Perce National Historical Park	Spalding	History	\$0.00	\$0.00		152,393	Winter: Daily 8-4:30; Summer: Daily 8-5:30		27	1	2
Tautphaus Park Zoo	Idaho Falls	Zoo	\$7.00	\$4.00		125,000	Mid-April to September: Daily 9-4; Memorial Day to Labor Day: Daily 9-5.		12	14	60
The Art Museum of Eastern Idaho	Idaho Falls	Art	\$4.00	\$2.00		30,000	Tuesday-Saturday 11-5		2	2	30
The Discovery Center of Idaho	Boise	Science	\$10.00	\$7.00		98,700	Monday-Saturday 9:30-5; Sunday 12-5		15	2	350
Wallace District Mining Museum	Wallace	History	\$3.00	\$1.00		49,000	Daily 10-5		2	4	2
Warhawk Air Museum	Nampa	History	\$10.00	\$4.00		23,500	Tuesday-Saturday 10-5, Sunday 11-4		1	2	31
World Center for Birds of Prey	Boise	Zoo	\$7.00	\$5.00		35,000	March-October: Daily 9-5; November-February: Tuesday-Sunday 10-4		4	1	86
Zoo Boise	Boise	Zoo	\$10.00	\$7.00		329,084	Daily 10-5				
Average			\$4.75	\$2.94		\$101,001			8.8	5.1	160.1
Median			\$5.50	\$3.00		\$90,000			7.0	2.0	60.0

Source: Official Museum Directory, 2015 Edition. Accessed online at www.officialmuseumdirectory.com. Data are as reported and not always updated or accurate

2.1.4 Focus on Main Museum Site Neighbors

The previous Idaho State Historical Museum and the current Old Idaho Penitentiary have both collaborated for common benefit with site neighbors. The main site neighbors for the ISHM (ISHM) are:

- Boise Art Museum
- Zoo Boise
- Discovery Center of Idaho

Not in Julia Davis Park but nearby is:

- Morrison-Knudson Nature Center

The main site neighbor of the Old Idaho Penitentiary is:

- Idaho Botanical Garden

These institutions are discussed below to help provide attendance, operational and financial benchmarks for the ISHM as well as to identify opportunities for additional collaboration for common benefit.

2.1.4.1 Boise Art Museum

Despite repeated attempts for an interview the requests were declined. The data in this report therefore reflect only published information set out in the previous section.

2.1.4.2 Discovery Center of Idaho

Opened in 1989, the Discovery Center of Idaho may be described as a child-focused science center or a science-**focused children's museum**. Younger children and their parents or caregivers are the primary market, although, as with many science centers, attempts are being made to broaden the market via periodic adults-only evening events. The exhibitions tend to be "analog" and "low-tech"; **this greatly reduces maintenance and staffing costs as high-tech exhibitions require significant upkeep and usually a dedicated technician on staff – a consideration that is very relevant for ISHM given the exhibition plan.**

The building is relatively small at 25,000 sq. ft. of which 11,000 sq. ft. is exhibition space. The existing facility was adapted from a former military training barracks and is owned by the City of Boise and offered rent-free to the Discovery Center.

Recent attendance levels are in the range of 110,000 annual visitors of which school groups account for about 17,000, or about 15% of the annual attendance. Very few tourists attend.

Admission charges are \$10.00 for all visitors (**a typical children's museum structure**) rather than the \$10 charge for adults and \$7 charge for children that used to be in place. The charge for children in school groups is \$3 per pupil, based on sponsorship of half the \$6 per pupil school group admission charge. Noteworthy is that the Discovery Center does not participate in the free First Thursday promotion, recognizing that a free day trains people to wait for that day to attend. The Center does offer a \$7 rate for all visitors on Sundays in part because it opens to the public only at noon on that day. No evening hours are offered because of the child focus of the Center. The Discovery Center operates with a membership base of 4,000. The

norm is for a variety of membership categories and prices but at the Discovery Center all memberships are charged at \$90 per person.

The Discovery Center has an operating budget of \$1.5 million of which about 70% is earned and 30% contributed. The Center changes one exhibition area every six months and has major exhibitions on a periodic basis, generally once every three years. This takes into account the substantial cost and staff-intensive requirements associated with such exhibitions and that if one for 3-4 months every year many people would wait to attend only when the major exhibition is in place. We have taken this experience into account in our recommendation in Chapter 4 for limited major exhibitions at the revitalized ISHM.

The Discovery Center operates with a full-time staff of 12 plus part-timers. No personnel are contracted out. The Center uses its own staff to create exhibitions and the Director presented the idea that the Discovery Center might create periodic exhibitions at the ISHM at lower cost. He also emphasized that the Discovery Center is at capacity and a capital campaign will be required to lead to a new facility that will offer 20,000 to 25,000 sq. ft. of exhibition space at a new site in the Julia Davis Park. This will overcome current over-crowding and allow for more exhibits to appeal to older children and to adults not accompanying children. It will also allow for more facility rentals than the current 10 per year. An innovation that is also planned for the revitalized ISHM is an electronic donor wall that lists donors of \$100 to \$25,000+ that may be easily changed.

2.1.4.3 Zoo Boise

The mission of Zoo Boise is to “connect visitors with animals to inspire and involve our community in the conservation of wildlife worldwide.” Zoo Boise is governed by the City of Boise and is within the City Parks and Recreation Department. A not-for-profit Foundation, the Friends of Zoo Boise, supports Zoo Boise in the areas of animal acquisition, capital improvement projects, education programs, volunteer opportunities, special events and the gift shop, café and carousel. The combined total operating budget of the Zoo is about \$2.3 million, of which the Friends generate \$900,000 while admissions and other earned income generated by the Zoo totals about \$800,000 and the City allocates about \$600,000. *In addition to cash support, the City provides in-kind services to the Zoo and the Foundation including legal, accounting and information technology as well as office supplies. Janitorial and maintenance are also City employees.*

The Zoo attracted about 340,000 visitors in 2015 of which 25% were free admissions. In fact, two free admission to all days per year (December and February) attract 12,000 visitors per day. *This study does not recommend any free admission days for the ISHM because they train people to wait for free admission days.* There are other ways to provide access to those who really cannot afford it, as discussed further in Chapter 4.

Of the 340,000 visitors some 50,000 arrive in school groups based on a modest admission charge of \$2.50 per student. The adult charge is \$10.00 during the May-September months, with \$8.00 charged for seniors (62+) and \$7.00 for children. During the other months the admission rates decline to \$7.00 for adults, \$4.50 for seniors and \$4.25 for children to reflect the outdoor orientation of the zoo. Free admission is offered to those two and under. The greater orientation to children of the revitalized ISHM suggests that it need not offer free admission to all under 6 as was previously the case.

The Zoo is in the midst of an \$8.9 million capital campaign to expand the site and enhance the exhibits, which are to be completed by 2019. Of this total one million dollars has been

allocated by the City with the rest to be raised privately. Some \$600,000 has been allocated to conservation efforts in Mozambique.

Admission charges will increase at Zoo Boise in the context of the expansion and enhanced exhibits, confirming opportunities for higher prices at the ISHM. On the other hand the interview process indicated a substantial level of price sensitivity among Boise residents and advice offered that this be kept in mind when setting admission charges for the reopened ISHM.

The very large majority of visitors are regional residents as is also the case for the 4,000 member households reported by the Zoo. Among other revenue centers, facility rentals are not a primary source of income for the Zoo. Charges are relatively modest at \$900 for an event of up to 100 people and grow to \$6,000 for a rental of 2,000 or more persons.

The Zoo operates with a full-time City staff of 18 as well as a Foundation staff of 12, plus seasonal and part-time staff.

2.1.4.4 Morrison-Knudson Nature Center

The Morrison-Knudson Nature Centre is operated by Idaho Fish and Game and its mission is to inspire appreciation and stewardship of our natural world. The Center is located on the greenbelt area off Walnut Street and consists of about 5 acres.

There is a Visitor Center that contains about 3,500 of space, much of it dedicated to exhibits. There are no admission charges and staff estimate total usage at about 150,000 per year, which includes the entire site and is not limited to Visitor Center users. Visitor Center attendance is largely driven by school programming focused mainly on pre-kindergarten up to the 4th grade - there are about 10,000 program attendees per year of which the vast majority are school groups. The Center charges \$2.25 per student for the school program, which is about 2 hours in duration for each school group, and \$1.75 per person for other programs such as StreamWalk which is a guided tour in the adjacent stream that explores aquatic life.

Staffing is minimal which limits the ability of the Center to expand its programming, but there is an opportunity to develop at least one focused collaborative school program with ISHS. Staff are open to discussions with ISHS around such a program.

2.1.4.5 Idaho Botanical Garden

The Idaho Botanical Garden is located on 33 acres of state land next to the Old Idaho Penitentiary, of which 15 acres is cultivated. It opened in 1987 and although technically open year-round relatively few persons attend from November through March. The warmer weather admission charges of \$7.00 for adults and \$5.00 for seniors and youth are reduced by \$2.00 per person from November through March.

Annual attendance is reported at about 140,000 but close to 70% of them attend outdoor concerts and events on site. About 45,000 is therefore the attendance total for the botanical garden, of which 11,000 attend on school field trips. Some 20% of visitors are estimated to be tourists. The botanical garden market skews heavily to older women, which is not a strong market for the Old Penitentiary, but it does create good ticket packaging opportunities as couples may split up with men attending the Old Pen and women the garden. ***Some 1,300 joint tickets offering a \$2.00 off of regular admission prices were sold last year. This is a good***

precedent for packaged ticket prices among Julia Davis Park attractions, as discussed further in Chapter 4.

The Botanical Garden has a substantial membership base of 5,000, or 8,500 individuals, starting at \$40 per membership in large part because membership is tied to first access to the Outlaw Field concert series. Seniors receive a \$10 discount on memberships; staff believe that mature women with higher income are the main membership market segment.

The Garden operates with 10 full-time and 15 seasonal staff. The operating budget is about \$1.5 million, with 70% contributed and 30% earned, largely from the concerts on site. Note that membership revenue is counted **within the "contributed" revenue** category and not earned as is normally the case. The Garden reports no funds from government sources.

Future plans include an indoor education/events pavilion in order to be able to increase weddings and other rentals business. About 30 weddings per year are currently held on site, largely the ceremony, with receptions held elsewhere. A capital campaign of \$7 million is planned for 3-5 years in the future to include not only the pavilion but also restrooms, a koi pond and other site enhancements.

2.2 COMPARABLES ANALYSIS

The following table details largely quantitative data from three of the six museums identified to offer particular comparability to the revitalized Idaho State Historical Museum. Those that participated are as follows in alphabetical order:

- Montana Historical Society Museum, Helena
- Museum of Idaho, Idaho Falls
- Washington State Historical Museum, Tacoma

Two of the three are state history museums and the other is an important regional history museum. The points that follow set out highlights of the data as well as of qualitative issues that emerged from follow-up communications. The objective is to consider potential implications to the planning of and benchmarks for the ISHM and other Agency sites in Boise.

- **Parking Availability and Cost:** One of the challenges of the ISHM site is the substantial competition for available free parking from other museums and related institutions in the area. Of the other museums considered, all three have their own dedicated parking. The Museum of Washington State has charged parking for 150 spaces and also leases some spaces out to private users as a way to generate operating revenue. Parking accounts for 5.8% of the operating revenues of the Washington State History Museum. The Montana Historical Society Museum has a modest 12 dedicated parking spaces. The interview process in Boise indicated the need for additional parking to serve the Julia Davis Park area. There was talk of additional parking associated with the nearby public library. ***if there is no additional parking in the area it will serve to limit the potential for increased attendance at the ISHM.*** No additional parking is assumed for the purposes of the projections in Chapter 5 of the study.
- **Size of Building and Exhibition Space:** Some of the museums have all functions under one roof and others like the ISHM have archival, administrative and other functions

partially or fully at other sites. Therefore the important metric for the purposes of this business plan is the size of the exhibition space. Before it closed the ISHM offered about 15,555 nsf of exhibition space. *When it reopens it is to include 17,485 nsf. Even with the expansion the ISHM would still be in the lower end of the range of the comparable museums in terms of exhibition space. On the other hand, more important than the square footage is the quality and appeal of the exhibitions to be offered, which will be substantially enhanced in the ISHM.*

- **Revenue Generating Spaces:** Lobbies are generally the main space used for facility rentals, primarily during evening hours when the museum is closed. The ISHM also has a multi-purpose space available for rentals. All the museums have retail stores and all are museum-operated. Only one has a small café, which is concessioned out to a private operator. Both are norms within the field. Two have lecture theatres. The ISHM will not have a fixed seat lecture theatre. Instead, it will utilize the multi-purpose space for lectures, films and other programs as needed.
- **Operating Schedule:** The ISHM was closed to the public on Mondays. This is common and found among one of the comparable museums. The Montana Historical Society Museum and the Museum of Idaho are both closed on Sundays. The Museum of Idaho is open until 8 p.m. on Mondays and Tuesdays, which is very unusual.
- **Admission Charges:** The adult admission charge for the ISHM before it closed was \$6.00. The charges at the three selected comparables are \$12, \$9 and \$5, respectively. The data confirm opportunities for higher admission charges for the ISHM when it reopens.
- **Memberships:** Prior to closing the ISHM had 220 memberships. The membership levels at the three participating comparables ranged from about 700 to 1,400 to 2,100, confirming opportunities for increased levels of membership at the reopened ISHM.
- **On-Site Attendance Totals and Visitors per Sq. Ft. Exhibition Space:** Attendance levels ranged from 46,000 to 85,000 and allows for visitors per sq. ft. exhibition space figures will be used as one of the methods to estimate attendance levels for the ISHM in Chapter 5 of this report.
- **Market Segments:** Not surprisingly, women account for a higher percentage of visitors and the market skews older.
- **Future Plans:** The museums are seeking to upgrade their visitor experience and add to collections storage space. Commonly expressed was a desire to increase both earned and contributed income.
- **Advice to the ISHS:** *Common advice when asked about factors for success and mistakes to avoid was to avoid unrealistic expectations for attendance and earned income even though there will be expanded space and an enhanced visitor experience.* The opening year success will not be repeated. Also recommended was to set aside a reserve fund to pay for unexpected capital expenses and needed change in the permanent exhibitions.

Selected Comparable Museums	Montana Historical Society Museum, Helena	Museum of Idaho, Idaho Falls	Washington State Historical Museum, Tacoma	Assumptions for Reopened ISHM
State Museum	Yes	No	Yes	Yes
On-Site Parking	Yes	Yes, 30 spaces, free	Yes, 150, charged	No
Size of Building (gsf)	65,000	30,000	106,000	41,950
Size of Exhibition Space (nsf)	25,000	15,000	37,825	17,485
Lecture Theatre (seats)	57	No	215	No
Retail Store Size (nsf public space)	500 (museum run)	1,500 (museum run)	1,400 (museum run)	940
Café/Restaurant (nsf)	No	No	500 (concessioned)	No
Regular Operating Schedule	Mon. - Sat. 9 a.m. to 5 p.m. (Closed Sunday)	Mon. - Tues (9 a.m. - 8 p.m.) Wed. - Sat (9 a.m. - 5 p.m.) Closed Sunday	Tues. - Sun, 10 a.m. to 5 p.m. Thursday to 8 p.m.	TBD
Admission Charges	Adult: \$5.00; Senior: \$5.00; Youth: \$1.00; Child (under 6: Free) School Groups Free	Adult: \$9.00; Senior: \$8.00; Youth: \$7.00; Child (under 3: Free; School Group (pp) \$3.00	Adult: \$12.00; Senior: \$8.00; Youth: \$8.00; Child (under 7: Free; School Group (pp avg.) \$6.50; Non-School Group \$8.00	TBD
On-Site Attendance, 2015	46,578	85,000	73,786	N/A
Visitors per SF Exhibition Space	1.9	5.7	2.0	N/A
On-Site Attendance, 2014	38,070	60,000	70,907	39,600
On-Site Attendance, 2013	35,000	62,000	59,456	37,600
Peak Attendance in Past Decade	46,578	157,000	73,786	N/A
School Groups as % of Total	15%	10%	22%	TBD
Tour Groups as % of Total	5%	1%	0%	TBD
Origin of Visitors - 50 mile radius	N/A	60%	38%	TBD
Paid/Indirect Paid Visitors	82%	90%	78%	TBD
Female Visitors	55%	60%	64%	TBD
Visitor Parties with Children	20%	60%	37%	TBD
Senior Visitors	N/A	10%	19%	TBD
Weekend Visitors	20%	20%	40%	TBD
Repeat Visitation in past year	30%	10%	52%	TBD
Avg. Length of stay (minutes)	90	90	115	TBD
Memberships	2,100	700	1,432	TBD
FTE Staff (PT = 0.3 FTE)	58.3	8.3	35	TBD
Volunteers	150	140	120	TBD
2015 Operating Budget	\$5,600,000	\$1,278,000	\$3,450,000	TBD
2016 Operating Budget	\$5,700,000	\$1,396,000	\$3,750,000	TBD
Admissions Revenue	12%	32.7%	11.0%	TBD
Retail	N/A	9.1%	2.5%	TBD
Rentals	N/A	0.4%	3.0%	TBD
Food Service	N/A	N/A	N/A	TBD
Membership	N/A	2.4%	3.0%	TBD
Programs	N/A	0.7%	1.0%	TBD
Fundraising Events	N/A	0.9%	0.0%	TBD
Other Earned	N/A	0.7%	5.8%	TBD
Total Earned	N/A	46.9%	26.3%	TBD
Total Private	N/A	43.5%	12.1%	TBD
Total Endowment	N/A	7.6%	2.0%	TBD
Total Government	87%	2.7%	64.0%	TBD
Staffing Costs	64.1%	34.4%	59.0%	TBD
Building Occupancy	N/A	9.7%	11.0%	TBD
Exhibitions	N/A	20.7%	12.0%	TBD
Programs	N/A	2.1%	5.5%	TBD
Collections Care	N/A	0.1%	1.0%	TBD
Marketing	N/A	6.5%	1.4%	TBD
Direct Costs of Fundraising Events	N/A	0.4%	0.0%	TBD
Retail Cost of Goods Sold	N/A	4.1%	1.1%	TBD
General and Administrative/Other	N/A	22.0%	9.0%	TBD
In-Kind Support	N/A	City groundskeeping	No	TBD
% Budget for Statewide Role	75%	N/A	10%	TBD

Source: April 2016 survey developed by Lord Cultural Resources and follow-up interviews

3. MARKET ANALYSIS

This chapter considers available data and interview feedback regarding the markets for and operation of the Idaho State Historical Museum (ISHM) before it closed for renovation, supplemented by basic data for the Old Idaho Penitentiary and the Idaho History Center. This is followed by analysis of potential resident, school and tourist markets for Boise and the Agency museums in Boise in particular. The objective is to identify key issues and opportunities to become the basis for recommendations and assumptions in the following chapter of this report and the projections of attendance, operating revenues and expenses in Chapter 5.

3.1 ANALYSIS OF EXISTING AGENCY MARKETS AND OPERATIONS IN BOISE

The focus of this study is on analysis, recommendations and projections for the revitalized Idaho State Historical Museum. However, the scope also includes identification of focused recommendations that will benefit other Agency sites in Boise. To consider such opportunities first requires analysis of the existing markets for and the operations of the sites.

3.1.1 Analysis of Previous ISHM Market and Operation

The ISHM closed to the public at the end of June 2014. Although the revitalized ISHM will be very different than the previous operation it is nonetheless useful to learn from it and to consider potential modifications.

- **Operating Schedule:** The Museum was open on a year-round basis from Tuesday through Sunday and from 9 a.m. to 5 p.m. There were no regular evening openings or variations that took into account warmer and colder weather months. Chapter 4 includes some recommended modifications.
- **Admission Charges:** The adult admission charge was \$5.00, with a discounted \$4.00 charge for seniors, \$3.00 for youth and children, and free admission offered to children under six years of age, on First Thursdays, Museum Comes to Life and other opportunities. The charge for school groups was \$1.00 per pupil and there was no tour group rate. Recommendations for both admission charge categories and specific amounts are set out in Chapter 4.

- **Attendance Levels and Seasonality:** Reported attendance increased from about 32,800 in FY2012 to 37,600 in FY2013 and 39,600 in FY2014. These are modest attendance levels and very much reflect the lack of investment in modernizing the visitor experience. Spring is peak for school group attendance and summer for tourist visits.
- **Main Market Segments:** School groups accounted for about 24% of total annual visitors. Among non-school visitors, residents within a 50-mile radius represented about 55% of annual visitors, with 10% from elsewhere in Idaho and neighboring states, a substantial 25% from elsewhere in the USA and 10% international. As is common for history museums, women accounted for about 50-55% of total visitors, but only about 25% of visitor parties are attending with children. This should increase with the introduction of a creative **children's gallery**.
- **Visitor Patterns:** Length of stay was in the range of 60-90 minutes and should increase with an enhanced visitor experience and will serve to justify an increase in admission charges. Repeat visitation levels were believed to be low.
- **Membership:** The Museum reported a relatively low 220 memberships, accounting for only about 1% of visitors, in part reflecting knowledge that it would be closing but also indicating limited perceived interest in repeat visitation given the very dated exhibitions.
- **Staffing and Volunteers:** The Museum operated with nine full-time and six part-time staff, supported by 30 volunteers. An increase in staffing levels will be necessary in the context of the enhanced facility including a shared position Volunteer Coordinator to attract and sustain a larger volunteer corps.
- **Operating Budget:** The ISHM had a very modest operating budget of about \$718,900 in FY14 compared to about \$757,100 the previous year. A larger operating budget will certainly be required in the reopened facility.
- **State Support as a Percentage of Operating Revenues:** In the year before closing, with lower levels of earned income, state support accounted for close to 77% of operating revenues. State support of the Agency generally runs at half the operating budget. *The percentage from earned and private sources should increase in the new facility and result in a lower percentage required from the state. However, in the context of a larger operating budget, the dollar amount required from the state is likely to increase.*
- **Staffing Costs as a Percentage of Operating Expenses:** With limited expenditures on exhibitions, programming and marketing in the year before closing, staffing costs accounted for close to 76% of operating expenses. This percentage should decline in the reopened facility despite the need for staff growth.

3.1.2 Analysis of Existing Old Idaho Penitentiary Market and Operation

The former Idaho Penitentiary dates from the 1870s. It closed in 1972 and, like some other former prisons across the country, was reopened as a visitor attraction. It is noteworthy that the Old Idaho Penitentiary (Old Pen) attracts more visitors than did the Idaho State Historical Museum with its Julia Davis Park Museum location and proximity to the highest attended museum-related institutions in Boise.

The Old Pen attracted about 56,800 visitors in FY15, up from 50,200 and 42,800 the previous two years. The Old Pen charges a little more than the ISHM did at \$6.00 for adults, \$4.00 for seniors, and \$3.00 for children and \$2.00 for school groups. Those who attend in groups of 10 or more receive a discount of \$1.00 per person. Combination admissions tickets with the ISHM were tried in the past but proved to be unsuccessful because of the distance between the sites. More successful has been a combination ticket with the Idaho Botanical Garden. **Chapter 4 recommends a simple "value added" admissions discount system that would be applicable to a variety of museums in the same area, whether or not they are part of the Agency.**

The Old Pen attracts more visitors because it offers more mass market appeal as a unique attraction in the region. This suggests opportunities for an enhanced ISHM to increase both attendance levels and admission charges when it reopens, assuming it similarly becomes a more mass-market attraction.

The Old Pen operating schedule varies by season as it is from 10 a.m. to 5 p.m. from Memorial Day to Labor Day and from noon to 5 p.m. during the other months of the year. Not surprisingly, as an outdoor-focused attraction, peak attendance takes place during the warmer weather months.

Some 70% of visitors are estimated to be from within a 50-mile radius of Boise, with 15% from elsewhere in the state or neighboring states, 10% from elsewhere in the country and 5% international. The norm for a penitentiary museum is for the market to skew more male than female, but staff estimate a balance between the genders at 50-50 in this case even though there is a male-oriented military-themed gallery on site (The J. Curtis Earl Weapons Collection), included with the price of admission. This would normally increase appeal to men and could conceivably encourage couples to split up with the male attending the Old Pen and the military museum with women attending the Idaho Botanical Garden adjacent to it. However, this does not appear to be the case in actual practice. Both attractions have collaborated on ticket packaging and there are opportunities for this to be expanded in the future with additional marketing expenditures. About 60% of visitors attend on weekends and estimated repeat visitation levels at 20-30%, if accurate, are surprisingly higher than was the case at the ISHM.

The Old Pen visitor experience has a powerful authenticity factor and the appeal of both indoor and outdoor spaces, many of which are ideal for rentals. The J. Curtis Earl Weapons Collection exhibition is something of an interpretive outlier at the Pen, but it does further enhance the pre-existing appeal for male visitors. If the Gallery is to be refreshed in the future, we recommend thematic integration with the interpretive plan of the main Museum to provide interpretive consistency.

Admissions revenue at \$205,000 is substantially higher than the \$69,100 reported by the ISHM and reflects more paid admissions. Earned revenue, including admissions, retail sales and rentals, combined for close to \$250,000, or 86% of operating revenues. If earned income is calculated as a percentage of the operating expenses of \$361,000 then earned income is still at a higher than average 69%. Costs are also controlled by extensive use of volunteers.

3.1.3 Analysis of Existing Idaho History Center Market and Operation

The Idaho History Center includes administrative offices of the Idaho State Historical Society, Idaho State Archives and State Records Center as well as two exhibition spaces. One is a small

temporary exhibition space of about 500 sq. ft. currently displaying a free admission Mexican art exhibition. There is also a somewhat larger but still modest exhibition space of about 900 sq. ft. It is the permanent home of an exhibition on President Abraham Lincoln and his relationship to Idaho and mandated to offer free admission. The exhibition has attracted about 4,300 visitors in 2.5 years open to the public. ***There will be an opportunity for the reopened ISHM and increased marketing of all the Agency sites to encourage more visitors to become aware of these opportunities as well.***

3.2 ANALYSIS OF POTENTIAL MARKETS

This section focuses on potential resident, school and tourist markets for Boise and the Agency sites in the city, especially the Idaho State Historical Museum (ISHM). The analysis includes a review of available data as well as feedback from the interview process.

3.2.1 Resident Markets

The resident market is important to all museums for the following main reasons:

- Residents are readily accessible and available on a year-round basis.
- Residents can be made aware of museums and their exhibitions and programs more easily and cost-effectively than may tourists.
- Residents are most likely to be repeat visitors.
- Residents are more likely to become volunteers, members and donors.
- Residents often advise, and accompany, visiting friends and relatives to area attractions.

3.2.1.1 Population Size and Projections

Although the ISHM is museum of and for the entire state, interviews confirmed a tendency for residents of northern Idaho to be oriented to Spokane or Seattle to a greater extent than to Boise. The primary resident market is therefore mainly a regional one that would correspond to the Boise Metropolitan Statistical Area (MSA), encompassing Ada, Boise, Canyon, Elmore, Gem, Owyhee and Payette Counties in Idaho and Malheur County in Oregon. The following table includes population figures for a 5-mile and 15-mile radius of the ISHM site as well as for the city of Boise, Ada County and the Boise MSA. The data are compared to state and national figures and projections.

The population of the Boise MSA is modest relative to larger city metropolitan areas, but its growth exceeded state and national averages from 2000 to 2010 and is projected to continue to exceed the national average until at least 2030. The population within a 5-mile radius of the site is projected to have only a slight rate of growth until 2030, confirming the importance of attracting regional residents to their state museum and to the Old Pen and History Center.

Resident Population			Projected		% Change	% Change
	2000	2010	2020	2030	2000-2010	2010-2030
5 Mile Radius	145,366	147,705	N/A	N/A	1.6%	N/A
15 Mile Radius	287,565	384,550	N/A	N/A	25.2%	N/A
Boise City	185,787	205,671	N/A	N/A	9.7%	N/A
Ada County	300,904	392,365	485,960	575,540	23.3%	31.8%
Boise MSA	469,020	618,050	722,850	838,040	24.1%	26.3%
Idaho	1,293,953	1,567,582	1,878,290	2,181,340	17.5%	28.1%
USA	282,162,410	309,330,220	340,554,350	373,751,030	8.8%	17.2%

Sources: Policy Map, 2010 US Census and projections from 2014 MSA Profile, Woods & Poole Economics

3.2.1.2 Age

The age profile of non-school visitors to most history museums is one that skews older. Plans to include a multi-disciplinary approach and a creative children’s gallery as part of the renovated ISHM should help to widen appeal to children and their parents, grandparents or caregivers and to school groups in younger grade levels.

The following age profile data for potential resident visitors indicates a younger median age for the Boise MSA relative to the national average, a higher percentage of children but a lower percentage of seniors. Interviews suggest that this profile is changing as more seniors, largely from California, choose Boise as a place to retire. At the same time overall projections for the next two decades confirm the trend to an aging population. The data *provide a demographic basis for a visitor experience that seeks to appeal to both the young family market and the growing percentage of seniors. Noteworthy is that today’s seniors are part of the baby boom generation that is not as intimidated about technology as their predecessors.*

Key Age Distribution, 2010	Boise City %	Ada County %	Boise MSA %	Idaho %	USA %
0-19 years	26.3%	29.2%	30.5%	30.5%	26.9%
20 - 24 years	8.4%	6.7%	6.4%	7.1%	7.0%
25 - 44 years	28.7%	29.6%	27.8%	25.8%	27.1%
45 - 64	25.9%	24.6%	24.3%	24.6%	26.0%
65 +	10.8%	9.9%	11.0%	12.0%	13.0%
Median Age, 2010	34.9	34.4	34.2	34.4	37.2
Median Age, 2020	N/A	N/A	35.4		
Median Age, 2030	N/A	N/A	35.3		

Source: 2014 American Community Survey and Woods and Poole Economics, 2014

3.2.1.3 Education and Income

Level of education is the variable with the closest correlation to museum and other cultural attendance and participation, as supported by numerous studies. The higher the level of education of an individual, the more likely it will be that this person will attend or participate. Like education, household income is an important indicator of potential museum/cultural attendance, but is not as significant an indicator as education. That is, high education, low-income persons are more likely to attend than are persons of high income and low education.

With respect to **educational attainment** the table below indicates that there is a higher percentage of residents within the city and county with a Bachelor's Degree than the MSA, state or national averages. This is positive because those closer to the sites are more likely to become repeat visitors and members.

Educational Attainment, 2010 (residents age 25+)	% of Residents with BA or Higher	% of Residents with Less than High School Education
Boise City	37.3%	6.8%
Ada County	35.0%	7.1%
Boise MSA	27.7%	11.4%
Idaho	24.3%	11.9%
United States	27.5%	15.4%

Source: 2010 American Community Survey, Woods and Poole Economics, 2014

Regarding per capita and household **income** levels, the data indicate figures within the city and county that are higher than those of the state or national averages, and with lower percentages living in poverty. *On the other hand, the Boise MSA is projected to rank lower over the years in per capita income and household income relative to other MSAs. This suggests the need for caution regarding the extent of increased admission charges if the museum is to be accessible to as many persons as possible.*

Income Levels, 2010	Per Capita Income	Median Household Income	% Living in Poverty
Boise City	\$28,162	\$50,402	12.3%
Ada County	\$27,915	\$55,835	10.2%
Boise MSA Rank of 366 MSAs 2010	243	181	N/A
Boise MSA Rank of 366 MSAs 2020	276	209	N/A
Boise MSA Rank of 366 MSAs 2040	297	230	N/A
Idaho	\$23,087	\$47,334	13.6%
United States	\$27,319	\$51,371	15.9%

Source: US Census 2010, 2010 American Community Survey, Woods and Poole Economics, 2014

Led by Dr. Gloria Totoricaguena, nine focus groups throughout the state in 2015 and 2016 indicated high expectations regarding the quality of the reopened museum, including for more entertainment value. The focus groups also indicated **expectations for "strong digital access"** and for **"constantly changing content."** There are of course financial implications of such expectations.

A detailed survey of teachers was also conducted that helped to inform plans for the visitor experience. The most useful question for the business plan itemized the **"top motivating factors to organize field trips to "any Idaho history museum."** They are as follows in rank order:

1. Free or low cost
2. Technology enhanced experiences
3. Well known expert guest speaker
4. Native Peoples artifacts
5. Scientific demonstrations
6. Movie, art or music experience
7. Natural resource related exhibits

Noteworthy is the expectation for free or low cost admissions despite the expectations of a high quality, constantly changing and technologically focused museum that offers more than cultural history.

3.2.1.4 Gender

Women account for a slightly larger percentage of the population but are generally a more important market for museums than are men for the following main reasons:

- Women tend to make the decisions in a household regarding educational experiences for their children. Therefore, the greater the perceived educational benefits of museum/ cultural opportunities the more likely they will be selected;
- Women account for a large majority of teachers who usually make the decisions regarding school field trip destinations;
- Women tend to make the decisions regarding attractions to visit while on family vacations and account for a large majority of bus tour passengers and trip planners.

Women are estimated to represent 50-55% of visitors to the ISHM when previously operational and likely 40-45% of visitors to the Old Pen. The fact that the Old Pen outdrew the ISHM for visitors despite lesser general appeal to women is a positive indicator of the opportunity for a more contemporary visitor experience at the ISHM to increase attendance levels.

3.2.1.5 Comparative Ethnicity

The data in the table below indicate a very **large majority "white" population but also** important Hispanic populations. Interviews confirmed the desire that the reopened museum seek to tell Hispanic stories, including the often forgotten phenomenon that early immigration to Idaho was not only east-west but also south-north. Those with a Basque heritage are of particular importance in Idaho. There are also important Native American and growing Asian populations.

Ethnicity, 2010	White	Black	Asian	American Indian	Other	Hispanic	Foreign Born
5 Mile Radius	89.3%	1.8%	3.2%	0.7%	1.6%	9.0%	6.9%
15 Mile Radius	91.7%	1.1%	2.6%	0.5%	1.3%	7.3%	5.8%
Boise City	89.0%	1.5%	3.4%	0.7%	2.5%	7.1%	6.9%
Ada County	90.3%	1.1%	2.6%	0.7%	2.4%	7.1%	5.8%
Boise MSA	83.2%	1.1%	2.3%	0.8%	N/A	12.7%	N/A
Idaho	89.1%	0.6%	1.3%	1.4%	5.1%	11.2%	5.9%
United States	76.3%	13.7%	5.8%	2.1%	5.2%	16.0%	12.9%

Source: Policy Map, 2010 US Census, Woods and Poole Economics, 2014

3.2.2 School Groups

School group visits are important for the following main reasons:

- Education is part of the mission and mandate of all museums;
- Children brought to museums as part of school field trips often convince their parents to take them again;
- For children in lower income/education families, attending on a field trip is often the only opportunity to attend museums.

The key determinants for schools to attend on field trips are the size of the student population within a convenient distance, relationship to curriculum, student enjoyment, proximity and cost, as well as the ability of an institution to help meet standards of learning and state testing requirements.

The Idaho State Historical Museum has the potential to attract substantially more students in school groups than the 9,400 in the year prior to closing for renovation. This is seen by figures in which the Old Pen reported 7,200 school group visitors in FY2015 despite much less clear curriculum links. ***The ability to attract more school group visitors will depend not only on widened curriculum links but also on the ability to address barriers such as the cost of school bus transportation and the cost of admission.*** These issues are discussed below.

3.2.2.1 Enrollment Levels and Projections

The following table indicates enrollment levels in Boise City and Ada County, compared to state and national averages. Of note are the substantial numbers of university/ college students in the city. There are about 20,000 students at Boise State who are only a 5-15 minute walk to the ISHM. Although Boise State and other college students and professors will not attend in school groups they are an important source of scholars, speakers, interns and potential visitors.

School Enrollment Levels	Boise	Ada	Idaho	USA
	City	County		
Population 3+ years enrolled	56,342	107,072	418,678	82,291,141
Nursery school (less than 5 years)	5.0%	5.7%	5.5%	6.1%
Kindergarten (5, 6 years)	4.7%	5.5%	5.6%	5.1%
Elementary (7-14 years)	35.7%	41.5%	43.0%	39.6%
Highschool (14/15-18 yrs)	19.9%	20.8%	21.8%	20.5%
College or graduate school (18/19 yrs+)	34.7%	26.6%	24.0%	28.8%
<i>Source: 2010 American Community Survey</i>				

Since grade 4 will remain the strongest curriculum link for the ISHM, it is useful to know that there are 3,000 grade 4 students in West Ada and 2,500 in Boise.

3.2.2.2 Curriculum Links

Interviews revealed perceived strengths and weaknesses of the previous ISHM and preferences for the future. Although it is understood that grade 4 will continue to be the grade that specifically focuses on Idaho history, there were comments that the reopened museum should have more cross-curricular links, **interactives and “wow” elements that would** encourage students and teachers to think about repeat visits in later grades. Regarding cross-curricular links, it has been long planned that the ISHM education staff will develop curriculum links that go beyond grade 4 history. The visitor experience plans include multi-disciplinary opportunities **and a children’s creative gallery, which should clearly widen the grade and** course focus and generally provide a much greater level of interactivity and fun while also meeting educational objectives.

Interviews also revealed an expectation for greater STEM links, particularly as related to geology, technology and engineering in Idaho history. Idaho core standards have been in place for four years and the common core will be retained. Next generation standards include less memorization and a greater focus on experimentation and critical thinking that will be applied in the reopened museum and therefore make it a higher choice in field trip selection.

3.2.2.3 Interactivity and Student Enjoyment

As confirmed in the interviews, field trips are selected not only because of curriculum links but also because of the extent to which they provide hands-on or interactive participation. With cutbacks in the funds available to schools, there is likely to be an even greater emphasis on selecting field trip destinations that are learning-based and age-appropriate in relation to both **content and activities, but also “fun”** and interactive, thus offering students higher levels of learning enjoyment. This is rooted in the knowledge that children are more likely to learn if their experience is interesting and enjoyable.

3.2.2.4 Field Trip Policies and Cost

A court case in West Ada that has affected all public school districts in Idaho has recently resulted in elimination of state funding for field trips and an inability to ask students or their

parents to fund any of the costs. However, Parent Teacher Associations are still raising money and interviews indicated their preference is to pay for buses over admissions. This is an important issue for the Agency. ***We have recommended seeking legislated state sponsorship for free school group admission to some or all Agency sites, especially the reopened ISHM. Alternatively, the funding of free admission to the state history museum might be limited to Title 1 schools or could be part of the menu of private sector menu of sponsorships discussed in Chapter 4.***

There are no mandated field trips in the region so the decision of which museum to attend is made by the classroom teacher to reflect both curriculum links and student enjoyment. Approval by the Principal is usually based on the extent to which a field trip is perceived to help meet the standards of learning. Field trips are also more likely to be selected if they have a STEM connection and if they offer the efficiency of two field trip destinations on one trip. In the case of the ISHM this could include combined field trips with the Discovery Center, Zoo Boise, Boise Art Museum and others in Julia Davis Park.

The field trip window of opportunity is generally between 9 a.m. and 2 p.m. when school buses are available and confirms that the schools most likely to attend will have a shorter travel time or are able to attend one destination on a trip.

3.2.2.5 Outreach

As a state history museum it will be important for the ISHM to widen its outreach initiatives throughout the state. The most practical is digital access.

One key trend that relates to outreach is greater engagement between museums and teachers as well as other types of learning organizations. The Museum already works with Boise State University on a variety of mutually beneficial programs. Our interviews revealed opportunities to partner even more closely with Boise State University, which has a public history program that could provide students with opportunities **to develop exhibits relating to their Master's** programs that could be shown at ISHM. At present, the University places 6 to 8 of these students around the city and there is a major opportunity for these students to provide benefit to the Museum while completing projects of value to their degree program. Such internships would last one semester; the Museum would need to mentor the students, and the Museum **would require staff time to report to the University's Internship Coordinator on student** progress.

Another opportunity relates to lectures or participatory forums, some of which might be quite **innovative and experimental, developed by the University's History Department but delivered** at the Museum - in other words, the Museum would provide the venue free of charge for the program. This would help the Museum take advantage of the large (approximately 20,000) student body that is virtually next door, while again providing a source of programming. Obviously the details of the program would need to be agreed between University and Museum.

Teacher training is yet another avenue for collaboration. There are already summer institutes held for teachers given by the Idaho Humanities Council to advance their training - conceivably some of these could be held at the Museum, which would increase teacher familiarity with the offerings and potentially boost school visitation. Again the requirement for the Museum would be to provide the space.

3.2.3 Tourist Markets

The very large majority of visitors to Idaho are domestic as opposed to international. The *Idaho 2015 Visitor Report* (Longwoods Travel, May 2016) focuses on domestic travel by Americans. In 2015, Idaho experienced 33 million person trips, an increase of close to 8% over 2013. There were only 30,000 international travelers who included Idaho as part of their trip.

Among domestic visitors, some 40% were overnight trips and 60% were day trips. Among the data of greatest interest to the business planning for the ISHM are the following points, some of which emerge from the interview process:

- **Visitor Party Composition:** Some 70% of overnight travelers are adults and 30% children under 18. For day trips it is 72% adults and 28% children. *Since adults traveling with children are more likely to attend museums the data confirm the wisdom of widening the appeal of the reopened ISHM to children.*
- **Business vs. Leisure Purpose of Adult Only Trips:** Among overnight adult person trips, 86% are for leisure travel, 9% business and 5% combined business and leisure. For day trip adult visitors it is 89% for leisure travel, 8% for business and 3% combined business and leisure. *Leisure travelers are far more likely to attend museums than are business travelers.* Noteworthy is that the convention market for Boise is expected to increase with the addition of 36,000 sq. ft. of space to the existing 50,000 sq. ft. Convention Center this year. There are 1,400 hotel rooms within a 5-block radius of the ISHM, with the addition of 500 more rooms by the end of 2017. This includes the addition of a 180-room Residence Inn under construction within a 2-block radius of the ISHM. The Convention Center is also within a walkable 5-block distance from the Museum.
- **Specific Main Purpose of Trip:** Visiting friends and relatives was the main leisure purpose of 45% of visitors, followed by the outdoors at 12%, touring 9%, special events 5%, city trip 3% and casino also 3%. The US average for a city trip is 5%. The city trip percentage for Idaho, however, increased from 2% in 2013 while the VFR percentage increased to 45% from the 42% in 2013. *Very informative is that visitors to Idaho rely more on the advice of friends and relatives (21% compared to 15% for the national average) pointing to the importance of appealing to regional residents because it is residents who inform visitors about things to do and often accompany them.* The growing population of Boise means there will be more visiting friends and relatives who will be informed about things to do by the friends or relatives they are visiting and often accompanied by them.
- **Museum Attendance Relative to Other Activities:** Some 12% of visitors to Idaho report attending a museum compared to the national average of 11%. Ranking highest among overnight trips to Idaho were hiking/backpacking, shopping, visiting a landmark/historic site, visiting a National/State Park and camping.
- **Seasonality:** Summer is the peak tourist season at 34% of the annual total, with 26% in the spring, 21% in the fall and 19% in the winter. *The data point to longer hours during the warm weather months, particularly when daylight may remain as late as 10 p.m. balanced against the fact that evenings are when most facility rentals take place.*
- **Repeat Visitation:** Some 81% of visitors had visited Idaho before, and 70% said they had visited in the past year. *Repeat visitors who have already been to the ISHM will require*

marketing expenditures to emphasize that the reopened museum is very different from the one that closed.

- **Average Nights Spent in Idaho:** The 4.2 nights in 2013 declined to 3.3 nights in 2015. *The greater the time spent in the state the greater the likelihood for having time to attend museums. The decline is thus of some concern if it is part of a trend.*
- **Mode of Transportation:** Visitors to Idaho are more likely to drive (74%) compared to 65% for the national average. Conversely those who arrive by plane at 20% is lower than the 26% national average. *The data emphasize concerns about limited existing parking to serve all the institutions in Julia Davis Park.* There are also growing tourist markets who arrive by air from non-stop connection cities such as Denver, Chicago, Seattle, Portland, Sacramento, Houston and San Francisco. There are currently 19 cities with non-stop air connections. Boise is the start and end point for most visitors to the state who arrive by air. Whereas air tourism has been increasing the trend has been to declining bus tour group visits, including to the Agency sites.

Idaho does not have a strong tourism image and would like to be known for more than potatoes or Sun Valley. Within 45 minutes of Boise there is white water rafting and skiing and Idaho has an increasingly recognized wine country. There are 50 wineries and 50 micro-breweries in Idaho. Boise itself has a vibrant downtown and offers a variety of cultural opportunities including the museums in Julia Davis Park. There is very little rain in the area, amounting to about 11 inches per year. Snow melts very quickly, so there is no need for an inclement weather strategy for museums.

Tourism marketing in Idaho is funded by a 2% bed tax. Half of the \$8 million generated goes to statewide marketing while the other half goes to regional marketing. The amount raised has been growing each year and expected to continue to grow in future years.

The data and analysis in this and the previous chapter help to guide our judgment in setting out recommendations/assumptions in the following chapter.

4. KEY RECOMMENDATIONS/ASSUMPTIONS UNDERLYING PROJECTIONS

This chapter builds upon the analyses in the previous chapters, the workshop and interview process and the judgment and experience of the consultants to lead to a series of recommendations and assumptions primarily for the Idaho State Historical Museum (ISHM) but also for other agency sites in Boise. Approved or modified assumptions will form part of the basis for attendance, operating revenue and expense projections in the next chapter of this report.

The strategic plan of the Idaho State Historical Society identifies four goals. They are as follows:

- Goal 1 - education and customer/visitor service
- Goal 2 - funding opportunities and partnerships
- Goal 3 - marketing and communications
- Goal 4 - training and organizational development.

From these goals it is clear that revenue generation, both earned and contributed, is a core part of the strategic plan. The recommendations in this business plan are intended to help achieve those goals.

It must be emphasized that some of the key assumptions for the new ISHM are fixed and thus not subject to business planning recommendations. These include the facility and exhibition plans and the capital investment which is in the range of \$16.9 million. Variable assumptions - those subject to the recommendations in this business plan - are operational items that range from admission charges and other revenue centers to the operating schedule and staffing.

The recommendations/assumptions have been grouped into the following categories:

- Branding the Reopened Museum and Agency
- Admission Charges and Categories
- Membership
- Retail
- Facility Rentals and Events
- Other Earned Income
- Private Support, Partnerships and Collaborations

- Operating Schedule
- Other Marketing/Operational Recommendations
- Staffing

4.1 BRANDING THE REOPENED MUSEUM AND AGENCY

The reopened ISHM is to offer a more contemporary visitor experience with a substantial level of interactivity and a concept that is to tell a story that includes not only cultural history but also the natural history, geology, agriculture, forestry and other elements of the past, present and future of Idaho. In this context the current name, logo and other elements of the branding of what is currently referred to as the Idaho State Historical Museum and the Agency as a whole should be modified when the museum reopens. Our specific recommendations are as follows:

1. **Name of the Museum:** There is an opportunity to convey that the reopened museum is very different from the one the public visited in and before 2014 by modifying the name. A variety of options were identified and discussed in the context of the workshop and interview process. **Our recommendation is to eliminate the term "historical" as no longer adequate to convey what the new museum will be about and that is tied to an "historical society" term increasingly perceived as elitist and antiquated. Although "history" would be preferred to "historical" we believe that term also has its limitations.**

There was some discussion of changing the "museum" name to "center" or another alternative but we do not recommend such a change. That is because a "center" may or may not be accessible to the general public and because the History Center name is already used to describe the administrative, archival and collections storage facility on Old Penitentiary Road. "Museum" is essential to the name as is "Idaho" since the museum is focused on the cultural and natural history of the state. And in that context we recommend that the "state" name be retained to emphasize the statewide mandate of the museum and the reality that the State of Idaho is the primary capital funder of the new museum and will also continue be the largest single source of operating costs, as is the case across the country. *The recommended name for the new museum is "Idaho State Museum" (ISM).*¹ As shown in Chapter 2, there are already 11 history museums that use the "State Museum" terminology and we believe more will use this name in the future.

2. **Logo:** We recommend development of a new logo consistent with the more contemporary visitor experience and modified name of the museum.

¹ From this point on in the report the current Idaho State Historical Museum (ISHM) is referred to by the recommended Idaho State Museum (ISM) name.

3. **Membership Branding:** Membership as a revenue center will be discussed later in this chapter. Here we focus on the re-branding of the membership program. We recommend that there be a modification so that lower level memberships (individual, family, etc.) are **not in a "society" but rather in the museums within the Idaho State Museum system**, including the Old Penitentiary and historic sites elsewhere in the state. The lower level memberships are therefore recommended to be in the Idaho State Museums while upper level memberships would continue to be in the Idaho State Historical Society. In the context of rebranding we also recommend the renaming of upper lever membership names like **"history lover" and "history fanatic"** to more elegant names that reflect the class and exclusivity that upper level members are often seeking.

4.2 ADMISSION CHARGES AND CATEGORIES

The workshop and interview process included discussion of the issue of admission charges and categories at the reopened Idaho State Museum, and to a lesser extent to other Agency sites. Our recommendations take into account the following points:

- **A Higher Quality Visitor Experience Merits Increased Admission Charges:** The visitor experience to be offered will be of a much higher level of quality than the previous operation. Although 19 of the 50 state history museums across the country offer free admission to all visitors (compared to 29 in 2002) many of them offer a visitor experience closer to the former Idaho State Historical Museum than what is assumed for the renovated and enhanced Idaho State Museum. *The change from free to charged admission was made about 20 years ago and it would seem inappropriate to invest in \$8 million of contemporary exhibits and return to free admission when the trend is to charged admission state museums across the country.*
- **Free or Low Cost Admission would be Unfair to Other Museums and Related Institutions in the Julia Davis Park area and in Boise Generally:** The Idaho State Museum will continue to have access to state operating funds not available to most other museums and related institutions in Boise. *If the Idaho State Museum offered free or very low cost admission it would force other museums to maintain lower admission charges than would otherwise be the case to enable them to remain sustainable.* Similarly we do not recommend undercutting private sector rates for rental facilities.
- **Admission Charges Should Reflect Other Charges in Julia Davis Park:** The following table indicates the current charges for the other main museum-related institutions in Julia Davis Park. These charges provide useful benchmarks for the Idaho State Museum.

	Boise Art Museum (free admission Thursdays)	Discovery Center (lower admission on Sundays)	Zoo Boise (lower in winter, discount on Thursday. Prices to be increased in expansion)
Adult	\$6.00	\$10.00	\$10.00
Senior	\$4.00	\$10.00	\$8.00
Youth	\$3.00	\$10.00	\$7.00
Child	\$3.00	\$10.00	\$7.00

Taking these points into account, our recommendations are as follows:

4. **Admission Charge Incentives Should Be Used to help Encourage Attendance during Weekday Afternoons:** The common visitation pattern for museums is that weekends are peak, especially for families, while school groups attend during the school year until about 1:30 or 2:00 p.m. The slow attendance periods are generally weekday afternoons until closing. Most of those available to attend during that period will be seniors and the unemployed. This study has recommended a weekday afternoon strategy that targets the **large and growing seniors' population as discussed further later in this chapter. In the context of admission charges we recommend a price incentive that would offer a discount for those who arrive at or after 2 p.m. on weekday afternoons on a year-round basis.** Those who arrive within 15 or 20 minutes before 2 p.m. on weekday afternoons should be encouraged to tour the gift shop or orientation opportunities until 2 p.m.
5. **Eliminate Free Admission First Thursdays:** Free days train people to wait for them. The Discovery Center has already opted out and Boise Zoo has participated only on the basis of discounts offered on Thursdays. The reality is that most who attend museums on free days are middle class people taking advantage of an opportunity. **There are other methods to encourage access to people who actually cannot afford it.** In particular this could include sponsored free admission tickets that would be distributed through social service agencies and religious institutions. These tickets would allow those who receive them to attend when they choose to do so and not feel stigmatized by attending on attending on a specific day. There was also discussion in the interview process that Hispanic families expect free admission. We recommend that providing free admission tickets to Hispanic families in financial need be one of the items on a menu of sponsorship.
6. **Encourage Increased Attendance by Youth by Modifying the Age at Which Adult Admission Charges Begin:** We recommend modification of the admission charge categories to define an adult at 25-61, with no requirement to show a student ID. This policy would not penalize young people who are not in university and likely in low paying jobs and who are very price sensitive. **Sponsorship for the "young adult" program should be sought.** Encouraging more youth to attend by means of modest financial incentives will help to increase the likelihood of their attendance when older. The discounted youth admission category would be aged 13-24 and recommended to be the same price as discounted senior rates.
7. **Request State Funding of Free Admission to School Groups from at Least Title One Schools and Ideally all Public Schools in Idaho:** This should reflect the importance of **providing access to students from throughout the state to Idaho's cultural and natural heritage and the aspects of its history that have made it distinct.**
8. **Create an Incentive for School Group Children to Return with Parents:** There is a tendency for many parents to see a school group visit as a substitute to a family visit because the benefits are perceived to accrue only to the child. This is particularly the case in lower income families. To increase the likelihood for returning with children or just to recognize price sensitivity we recommend a coupon should also be distributed to each child on a school visit, inviting them to return with parents who would receive a \$2.00 discount on each adult admission ticket for a period of 30 days from the date stamped on the coupon. Sponsorship for it should be sought as part of the recommended menu of sponsorship opportunities.
9. **Offer a "Value Added" Admissions Structure with Other Charged Admission Museums:** The weakness of passport and other common ticket packaging options is that

they require money to change hands among the participants. In the “value added” concept visitors pay the full price to the first museum they choose to attend and are informed to keep the ticket stub for a discount or are provided with a coupon for other participating museums or attractions within a specified period. The first museum retains all of the money and adds value to the price of its admission while the others have greater access to its visitors by offering the discount. This concept received a favorable response from the representatives of Zoo Boise and the Discovery Center who were interviewed as part of this planning process. This is an example of the type of collaboration that should increase among the institutions in Julia Davis Park. A similar formal arrangement should be pursued by the Old Pen with the Idaho Botanical Garden.

10. **Recommended Admission Charges are as follows for the Reopening Years of Operation.** The assumption is that admission charges will increase in Year 3 to reflect the fact that admission charges should increase over time.

	Year 1-2	Years 3 -5
Adult (25-61)	\$10.00	\$11.00
Senior (62+)	\$8.00	\$9.00
Youth (13-24)	\$8.00	\$9.00
Child (3-12) and Veterans	\$5.00	\$6.00
Weekday Afternoon (all visitors after 2 p.m.)	\$5.00	\$6.00
Non-School Group	\$7.00	\$8.00
School Group	\$0.00	\$0.00
Indirect Paid/Unpaid	\$0.00	\$0.00

11. **Admission charge associated with the major level exhibition is assumed to be a \$5.00 surcharge in all ticket categories,** including the free admission categories. Only members and VIPs will receive free admission. This is assumed to be applicable over a 4-month period in Year 4 of the projections.

4.3 MEMBERSHIP

Our recommendations regarding the membership program are as follows. These take into account that the main motivation for lower level memberships (individual, family, etc.) is value for money spent while the motivations of upper level members are primarily to support the mission of the museum, civic/state pride and other altruism.

12. **Offer lower level membership in the “Idaho State Museums”** to include the ISM and the Old Pen and other Agency sites whether or not they charge admission. This should include the common benefits of free admission and discounts on programs, events and facility rentals. Upper level membership should remain in the Society to reflect the exclusivity sought by many upper level members.
13. We recommend that the stipulation in the Family lower level membership category that **the membership be limited to two adults and “all children under 18 residing in the same home” be modified to delete reference to children under 18.** The reality in many

households is that many include children over 18 who should continue to be welcomed as long as they are living in the same household. No identity check should be requested to confirm such claims.

14. **Introduce and Market a 2-Year Membership Option:** This will help to control the time and cost of seeking to secure membership and should be the most popular in association with the reopening of the ISM.
15. **Introduce Guest Passes for Upper Level Members:** We recommend that upper level members at the \$500 or higher level be credited with a tax receipt for guest passes to be distributed in their name to those in financial need through social service agencies, religious institutions and schools. If used for their own purposes a tax receipt would not be available.

4.4 RETAIL STORE

16. **Seek to Increase Retail Sales Based on Higher Attendance and a Modified Product Line:** The small 840 sq. ft. retail store is appropriately and efficiently integrated with admissions. The new name for the Museum (ISM) will look cooler on a T-shirt than ISHM and the creative children's gallery and increased natural history will all offer opportunities for modifying the product line. The two-headed calf plush toy should continue to be popular, especially with more children attracted to the Museum. (Two of the interview subjects recommended that the two-headed calf be reintroduced as an exhibit).
17. **Eliminate the Proposed Table and Chairs in the Retail Store:** Although having prepackaged desserts, sandwiches and beverages is a very positive idea within the retail store, one table in a very small space will create resentment. All of the space within the store should be utilized for retail products, including use of ceiling height.
18. **Implement Plans for On-Line Sales when the Museum Reopens.** The norm is for on-line sales to account for about 10% of total retail sales.

4.5 FACILITY RENTALS AND EVENTS

19. **Pursue Plans to Focus on Facility Rentals and Events:** New history museums are positioning themselves as popular venues for evening and other rentals, long enjoyed by art museums. Modernized history museums such as History Colorado tend to have greater appeal. Plans for the reopened facility that should enhance the attractiveness of the ISM for evening rentals include an historic oak bar, stained glass dome and historic piano that will be functional.

The Old Pen is also planning to create new indoor spaces for facility rentals. This suggests limited evening opening days even though it is light until 11 p.m. in the summer in order to make the Museum available for evening rentals.

20. **Introduce Birthday Parties.** The introduction of the creative children's gallery will increase the likelihood of a successful weekend birthday party program for children.

21. **Continue to Offer Discounted Rental Rates to State Government Agencies.** This recognizes the reality that the State of Idaho is the primary capital and operating funder of the ISM.

4.6 PUBLIC AND EDUCATIONAL PROGRAMS

In the context of a business plan the focus here is on the attendance and revenue generation aspects of such programs.

22. **Expand “Behind the Scenes” Guided Tour Opportunities at the ISM, Old Pen and the Archives.** This might start with tours of collections storage with a curator limited only to upper level members and major donors and scheduled once per month and if successful grow to surcharged tours for the general public. Guided tours of the Old Pen are currently offered twice per week with a third opportunity added during the summer months. There is no surcharge for the tours when offered. A survey of visitors found that 70% would like to take a guided tour. The main limitation is the absence of guides. The expansion of the volunteer program discussed further below should help to increase the number of tour guides available to all of the Agency sites in Boise.
23. **Introduce a Weekday Afternoon Strategy to Target Seniors.** Very few visitors are in most museums on weekdays after 1:30 or 2.00 p.m. when the school groups depart. A weekday afternoon strategy offers an opportunity to visit for seniors, the unemployed and others with available time to attend. The weekday afternoon strategy requires communicating that weekday afternoons are quiet times in the museum, that a substantial discount price is offered and that free demonstrations and tours are available as well as programs of interest. Sponsorship should be sought for the program as one of the items on the recommended menu of sponsorship opportunities.
24. **Eliminate the Brown Bag Lunch Program currently on the Second Tuesday of the Month at Noon to Instead Offer a Weekly Program at 2 p.m. that Excludes Brown Bag Lunches.** This would be part of the incentivized admission period and weekday afternoon strategy as discussed above and in Recommendation 4. Sponsorship should be sought for it.
25. **Quantify and Communicate the Number of Institutions and People Served by Programs and Services provided by the Agency to Institutions throughout the State:** In the context of needing ongoing operating support, it is important that the state and private funders understand the extent of the statewide mandate that is achieved by the Agency.
26. **A Major Level Exhibition should be brought to the Museum only every Third Year.** This recognizes the reality of the high cost of most major exhibitions and the staff and other resources that must be allocated to the planning and implementation of such exhibitions. This also recognizes that the Museum of Idaho focuses on such major exhibitions and that some lenders would consider Idaho Falls and Boise to be too close together, even though they are five hours drive apart. Taking into account opening year excitement, the major temporary exhibition is assumed for Year 4.

27. **Introduce Themed Events to Entice Millennials:** There are opportunities for the ISM and Old Pen to focus on various historical themes to create evening events with music and drink capable of attracting millennial markets.
28. **Implement Programs Partially on the basis of Mission but also on the basis of what Private Funders are willing to Support** on the menu of sponsorship opportunities discussed below.
29. **Train Staff and Volunteers to be able to offer Interpretation at Both the ISM and the Old Penitentiary.** This offers variety and should be more easily facilitated with implementation of the recommended Volunteer Coordinator position, discussed further below.

4.7 OTHER EARNED INCOME

30. **Introduce Pay for Photo Opportunities based on Costume Rental in front of Specific Period Settings.** The Old Pen offers cut outs that allows visitors to take selfies or photos of their friends or family members. Additional opportunities should be identified based on costume rental for the ISM and the Old Pen.
31. **Introduce Interactive Donation Boxes:** There is a donation box at the Old Pen that offers a “guilt message” that donations help to preserve buildings. We recommend widening this for the ISM to emphasize that donations help to fund free admission for school groups and others in need. In addition we recommend asking a skilled volunteer to create donation boxes that will respond mechanically to the placement of money in it.

4.8 PRIVATE SUPPORT, PARTNERSHIPS AND COLLABORATIONS

32. **Clearly Delineate the Focus of the Friends of the Idaho Historical Museum and Old Pen.** Although the Friends has existed as an auxiliary since 1965 and a Friends group since 1990 the reality is that its membership levels and activities have declined substantially in recent years, particularly with the growth of the Foundation, which was founded in 2000. We recommend that the Friends focus on attracting and maintaining volunteer support for the Agency sites while the Foundation focuses on fundraising.
33. **Create a Menu of Sponsorship Opportunities:** An increasing number of museums have implemented an actual first come, first served menu of sponsorship opportunities that would go beyond requests from larger funders and create opportunities for smaller sponsorship opportunities. Such sponsorship opportunities would be posted on the web site, and distributed in hard copy to known existing and potential supporters. Potential opportunities could range from sponsorship of school buses to bring children from disadvantaged areas, free admission for those in need, collections acquisition, research initiatives, and a variety of other opportunities to be identified by staff and identified in this report. An electronic donor that may easily be modified should be created, itself part of the menu, to honor those who have made donations. The concept of the menu of sponsorships leads to implementation of programs that are sponsored and to a determination by senior management of the Agency of which other menu items should be supported for mission-related reasons from general revenues.

34. **Pursue New Partnership and Collaboration Opportunities:** Earlier in this chapter we recommended a value added admission charge structure for all of the charged admission museums in Julia Davis Park, which is very much the cultural campus of Boise. There are other opportunities for collaboration that should be pursued including collaboration on open hours, joint marketing, etc. Discussion should take place among the Directors of the Zoo, Discovery Center, Art Museum, Black History Museum, Idaho State Museum and others in the area about a formal collaborative that would also focus on joint volume purchases of supplies and services at lower cost to all participants. There are a variety of examples of such formal collaboratives across the country, including the Museums of Balboa Park in San Diego, Hart of Brooklyn and University Circle in Cleveland.
35. **Provide an Orientation Role to other Museums/Sites throughout the State, whether or not they are Agency Sites:** This reflects the reality that for most tourists arriving by air the start and end point is Boise. Of particular importance would be to provide an orientation role to Native American sites that are of particular interest to international tourists. These include the Nez Perce tribe interpretive centre and casino south of Lewiston, the Shoshone tribe museum and casino in Pocatello and the Sacajawea site in Salmon. Tribes with casinos might be potential funders of the reopened ISM.
36. Collaborate with other institutions in Julia Davis Park regarding *food trucks* that would serve Park users and guests of venues that do not have food service facilities.

4.9 OPERATING SCHEDULE

37. **Give Priority to Facility Rentals in Evenings:** The data point to the potential for longer open hours during the summer months, particularly when daylight may remain as late as 11 p.m. and when extremely hot during the day. However, this does not appear to translate to evening openings for other attractions in Boise with the exception of Thursday evenings to 8 p.m. at the Boise Art Museum. Our recommendation is for only one evening opening per week, as discussed below, largely because evenings are when most facility rentals take place. One evening rental may generate far more revenue than would attendance during that period.
38. **Open the ISM on Thursday Evenings to 8 p.m. to Correspond to the Open Hours of the Boise Art Museum:** It is noteworthy that Zoo Boise and the Discovery Center do not have evening open hours even in the summer months, largely because they attract a largely young family market. The ISM will attract both a young family and adult market so remaining open to have crossover with the Art Museum appears appropriate. An evening opening for the Old Pen is recommended associated only with the Halloween period. No evening opening is recommended for or the exhibition spaces in the Idaho History Center.

4.10 OTHER MARKETING/OPERATIONAL RECOMMENDATIONS

Branding and naming issues were discussed above. Here we consider additional marketing/operational recommendations.

39. **Seek More and Better Directional Signage to the ISM.** This might be a collaborative effort with other museum-related institutions in Julia Davis Park and for the Old Pen with the Idaho Botanical Garden and the Idaho History Center.
40. **Develop Regular Visitor and Non-Visitor Surveys:** Understanding existing and potential markets is crucial to planning the future of the ISM and the role of marketing in that planning. We recommend that the Agency continue its work with evaluator Dr. Gloria Totoricaquena to develop periodic visitor surveys and analyses.
41. **Add Flags and Banners to Boost Awareness Levels:** There are a variety of institutions in the Julia Davis Park area. The enhancements to the building will help it to stand out but adding flags and banners would also be beneficial.
42. **Barter Media Content in Return for Discounted Advertising Costs:** With the media cutting back on the number of reporters they are increasingly seeking content they need not pay for. This creates an opportunity for staff and volunteers of the Agency to barter media content.
43. **Enhance the Website:** Today, websites are moving beyond merely posting opening hours, ticket prices and directions to become an integral part of the overall visitor experience. Websites are not a substitute for on-site visits, but represent a new frontier for engagement; **providing comprehensive access to an institution's collection, expertise and knowledge base**, as well as providing a virtual guest experience with exhibitions and interpretive content. And good websites help to motivate on-site visits. Museums are therefore improving their websites to seek to virtually mirror the physical experience of a visit. Everything that the institution has come to stand for is now represented in digital **form, providing a parallel virtual showcase of an institutions' exhibitions, collections** and programs. In addition to improving access, museums have also been improving user interfaces in an effort to ensure that the digital visitor experience is enjoyable and educational too.
 - o The visual impact by updating fonts and graphics with a cohesive and more contemporary look.
 - o More imagery which reflects a diverse audience base who are active and having fun in the galleries and during programming.
 - o Links among Agency sites and to other site neighbors.
 - o To take into account a statewide mandate, virtual exhibitions and better digital interface.
 - o On-line registration and payment options, including items to purchase from the retail store.
44. **Enhance the Social Media Presence:** Social media, such as Facebook, Twitter, YouTube, Instagram, TripAdvisor, etc., have had a significant impact on our daily 21st century lives and museums have embraced these new media as a way to not only communicate and promote their activities, but interact and engage with visitors as well. The use of social media creates an opportunity for a two-way dialog, and the goal for developing audiences with this tool should be to increase not only the number of followers but also the number of tagged posts/tweets, comments and reposts/retweets. Recommendations for improvements to social media platforms include:

- Ensure all social media images and video content are of a high quality and consistent with the website and across all platforms.
- Increase posting frequency. Facebook recommends posting at least 5 times per week in order to stay top of mind for followers. On Twitter the frequency can be much higher if desired. Publishing on Fridays and Saturdays is fundamental for museums as that is the time people plan their weekend activities.
- Introduce additional relevant and interesting original content. This could include **“object of the month” or “exhibition sneak peaks” as well as “behind the scenes” looks** at museum operations such as exhibition builds and event preparation. Content which encourages digital audiences to participate and interact with it on social media such as **“what is it” or “ask a curator” should be prioritized.**
- Facebook suggests that posts which include a picture generate about 120% more engagement than the average post. The museum can increase visual impact by ensuring that as many posts as possible are attached to a photo or a video.
- Trip Advisor is an essential information resource for those planning a trip. Efforts **should be made to ensure that the museum’s TripAdvisor profile is regularly** monitored. Positive reviews should be **reinforced with comments such as “we’re so glad you enjoyed your visit!” and negative comments should be dealt with straight** away with an apology, an explanation and an invitation to return. Imagery and visitor information should be updated.

Enhancements to both the web site and to social media should be part of the recommended menu of sponsorship opportunities discussed below.

4.11 STAFFING

The Idaho State Historical Society has a total FTP allocation of 49 including Agency Administration, SHPO, the State Archives and State Records Center and the Idaho State Historical Museum. A recent Zero-based budget process, required by the State of Idaho, set forth Agency statutory responsibilities and staffing benchmarks as compared to industry standards.

This business plan analysis, while focused on the new state historical museum, also seeks to **leverage the Agency’s overall ability to deliver its** mandated mission in a fiscally responsible and sustainable manner.

The staffing recommendations are presented for both Agency-wide success and to ensure that the new Museum meets its educational and revenue goals.

45. The recommendation is to increase **Museum staff** from 9 FTE (full-time equivalent) to 18 FTE with the recommended/assumed additional staff. In Year 4, the implementation of a 4-month major exhibition will require additional part-time staff, bringing the total to 20 FTE that year.

The additional museum staff are as follows:

- Full-Time Business/Enterprise Manager to oversee admissions, retail and facility rentals;

- Bookings Clerk to be responsible for booking rentals, school and group tours and be an overall assistant to other staff
- Additional full-time Admissions person
- Part-time retail and information staff
- Part-time weekend and also evening staff to meet the needs of facility rentals. To limit the need for additional weekend staff it has been assumed that all full-time staff persons in the Museum, regardless of their position, will work on periodic weekend days and interact with the public.
- One additional Education Specialist to expand education programs for schools in Boise and virtually across the state;
- An additional Curator to steward and promote the **state's significant collections**.

Contracted services are assumed to include janitorial, information technology and security services. Also assumed is an exhibition maintenance contract to ensure that high tech exhibitions, interactives and multi-media are fully functional for visitors.

46. The recommendation for growth in **Agency staff** is 3 also on expanding revenue, controlling costs, and ensuring maintenance and security of Agency assets. Three additional staff are as follows (3.5 in Year 4):

- Full-time Marketing/Communications Manager to ensure that the Museum and Agency are promoted to achieve increased attendance and a higher earned income return on investment;
- One new Volunteer Coordinator Position that would also be responsible for the Membership program. There are opportunities for the reopened Museum to excite a substantial numbers of volunteers. To attract, organize, honor and maintain them requires a Volunteer Coordinator who could provide such a service to the entire Agency, including the Old Pen, the State Archives and State Records Center, and the State Historic Preservation Office. Given concerns about cost control we recommend and assume that this individual also be responsible for coordinating the membership program. Membership levels should increase in the context of the reopened ISM;
- One additional maintenance staff dedicated to the ISM to ensure that the facility is at its optimum of appearance and operational ability at all times (with an additional 0.5 FTE during the major exhibition in Year 4)

5. ATTENDANCE, REVENUE AND EXPENSE PROJECTIONS

In this chapter we set out independent projections of attendance, operating revenues and expenses for the Idaho State Museum (ISM) assuming implementation of the agreed recommendations/ assumptions set out in Chapter 4 for the opening five years of operation. Year 4 is assumed to include a four-month major level traveling exhibition. The projections are also based on the contextual/ comparables and market analyses in Chapters 2 and 3 as well as the judgment and experience of the consultants.

The projections build upon a “base level” for revenues that reflects the FY2014 pre-closing actuals as the closed Museum has not generated income from earned sources since closing. Regarding operating expenses, some of the data reflect the experience of the closed museum but the Agency and Museum staff has been largely retained. The staffing projections therefore build upon the budgeted FY2017 figures provided by Agency senior management. All projections are in 2017 constant dollars and rounded to reflect the order of magnitude nature of projections. Where precise figures are shown it is because they are based on estimated percentage changes.

5.1 ATTENDANCE PROJECTIONS

Attendance levels at the ISM were the range of 32,800 to 39,600 visitors per year in the three years before closing (FY12-14). For the purposes of these projections we will use the FY2014 figure of 39,600 visitors as the base level upon which the attendance projections for Years 1-3 and 5 will be based. Year 4 is considered separately below as the year with an assumed 4-month major level temporary exhibition.

Although all methods to estimate attendance have weaknesses, a variety of quantitative methods have been used to estimate attendance levels for the revitalized Idaho State Museum during regular visitor experience years. Since the data are for operational state museums, the benchmark figures generated are for a stabilized year of operation, assumed to be Year 3.

5.1.1 Benchmarks from Other State Museums

The benchmarking data detailed in Chapter 2.1.2 indicate that free admission state museums average attendance was about 207,000 with the median at 105,000. The charged admission museums the average was 175,000 annual visitors with the median at 60,000. These figures are skewed by a few very high attendance state museums. For the purposes of these projections we have used the mid-point between the median figures as the benchmark, or about **82,500 annual visitors** in the stabilized Year 3 of operation.

5.1.2 Benchmarks from Three Selected Comparable Museums

The three museums that offered detailed data and good comparability to the ISM are the Montana and Washington state museums and the Museum of Idaho. All are in smaller cities, in the northwest and all charge admission. Data from the three are used to create benchmarks for the ISM:

- **Visitors per Sq. Ft. Exhibition Space:** The ratio that emerges from the three comparables is 3.49 visitors per net sq ft. of gallery space. Applied to the 17,485 nsf of exhibition space assumed for the new ISM, this ratio indicates an attendance of about 62,000. This appears to be below the low end of a reasonable range.
- **Visitors per Thousand Metropolitan Statistical Area (MSA) Population:** The ratio from the two comparables is 452.05 visitors per thousand MSA population. Applied to the 618,050 population of the Boise MSA in the last census, this ratio indicates an attendance projection for the new ISM of about 279,400. However, the population data are skewed in all three cases and lead to a result that is far above a reasonable level. We have therefore used judgment to divide this estimate in half to **139,700**.

The mid-point of these two estimates is about 100,900 visitors.

Attendance Levels at Selected Comparable State Museums	Reported Attendance	Size of Exhibition Space (NSF)	Visitors per NSF Exhibition Space	MSA Population	Visitors per 1,000 MSA Population
Montana Historical Society Museum, Helena	46,578	25,000	1.86	77,414	601.67
Museum of Idaho, Idaho Falls	100,000	15,000	6.67	136,108	734.71
Washington State Historical Museum, Tacoma	73,786	37,825	1.95	3,733,580	19.76
Average	73,455	25,942	3.49	1,315,701	452.05
Assumptions for Idaho State Museum		17,485		618,050	

5.1.3 Ranking against Other Museums in Idaho

Chapter 2.1.4 sets out attendance and other data for other museums and related institutions in Boise and elsewhere in the state. The objective here is to use judgment to rank the ISM against the other museums. In our judgment the ISM will attract in the same range as the 100,000 visitors reported by the Museum of Idaho in Idaho Falls. The larger resident, school and tourist market base of Boise relative to Idaho Falls is judged to offset the higher attendance due to the annual major exhibition at the Museum of Idaho. We estimate that the attendance at the ISM will also be in the same range as the Discovery Center in Boise based on the larger exhibition

space at the ISM relative to the 11,000 nsf at the Discovery Center but offset by the higher repeat visitation of a **children’s science museum**. For the purposes of the attendance projections in this study we have used our experience and judgment to estimate 100,000 visitors for the ISM in a stabilized year of operation.

5.1.4 Average of Quantitative Methods Used

The following table summarizes the three methods used and suggests an attendance in the stabilized Year 3 of about 94,500 visitors during regular visitor experience years.

Benchmarks from Other State Museums	82,500
Benchmarks from Three Selected Comparables	100,900
Ranking Against Other Museums in Boise	100,000
Average of Methods Used	94,500

5.1.5 Factors Suggesting Higher or Lower Attendance Projections

The ratios above suggest an attendance range in a stabilized year of operation (Year 3) in a regular visitor experience year at about 94,500 annual visitors to the Idaho State Museum. However, as previously referenced, each of the methods above has its limitations and weaknesses. The following points represent qualitative factors, some of which suggest actual attendance levels will be higher and others lower than indicated in the various ratios:

- **A Much Wider Appeal Visitor Experience:** The assumption of a much more contemporary, interactive visitor experience than was available in the pre-closing operation and better than commonly found in most state history museums (including a creative **children’s gallery**) should help to boost attendance levels above what was suggested in the ratios above, especially for repeat visitors. This should lead to higher attendance.
- **A Focus on Cost Control:** One of the objectives of the business plan is to control the increase in staffing and other operating costs, including marketing. While such costs will necessarily increase the level of increase will not be as substantial as often found in expanding and revitalized museums. This factor should contribute to lower attendance levels and revenues but also to lower operating costs. We support a reasonable cost control strategy from a bottom line perspective because of the reality that it takes a substantial number of visitors to pay for the salary, benefits and overheads of a single staff person.
- **Higher Admission Charges but Free Admission to School Groups:** There was reportedly resentment in the past when free admission ended. There will also likely be some resentment among some at higher admission charges despite a substantially enhanced visitor experience and facility. On the other hand the recommended and assumed free admission for school groups should help to increase attendance levels at a time in which transportation and admission costs along with liability concerns and a focus on test scores has caused a general reduction in school field trips. On balance, this factor is likely to be slightly negative.
- **Opportunities for Evening Rentals Visitors:** The previous operation did not lend itself to evening rentals. This will change in the revitalized facility which will offer much more

appealing space and rentals opportunities. The result is not only more earned income but also higher attendance because those who attend during rentals opportunities are legitimately included in attendance levels as part of an indirect paid admissions category.

- **Increased Collaboration with Other Museums in Juliet Davis Park:** The assumption of a value added admissions ticket incentive and a general increase in collaboration should help to boost attendance levels somewhat.

Taking the points above into consideration suggests an attendance level in a stabilized year of operation that is slightly higher than indicated in the various ratios. We estimate attendance levels in Year 3 at a rounded *95,000 on-site annual visitors*.

5.1.6 Projected Attendance Levels and Patterns

Almost all new or substantially enhanced museums experience their highest attendance level in the opening year. This is because of the novelty factor and the media attention paid to a newly opened museum, which causes area residents to be more likely to attend. We estimate Year 1 attendance at about 20% higher than the 95,000 Year 3 visitors, or a rounded 115,000 visitors, with Year 2 at 100,000.

Our projection for Year 4, with a major level exhibition over a 4-month period is that the exhibition will enable the ISM to reach Year 1 levels, or 115,000 visitors with a 4-month major exhibition. Attendance levels are not substantially higher for the year because of the phenomenon of substitution. That is, some persons who would have otherwise attended another time during the year will defer attending until the major exhibition is in place.

Year 5 will see a drop-off as some persons who attended the major exhibition will be less likely to attend during the following year. Attendance that year is estimated at 90,000 visitors.

In summary the attendance projections for the opening five years of operation of the revitalized Idaho State Museum are as follows:

Year 1:	115,000
Year 2:	100,000
Year 3:	95,000
Year 4:	115,000 (4-month major exhibition)
Year 5:	90,000

The attendance projections are segmented as follows:

- **Attendance by Main Market Segment:** Resident attendance will be the highest in the opening year, and will then decline to a stabilized level. Tourist attendance should increase over time while school group attendance should remain fairly constant for each year projected at much levels higher than in the past but as a lower percentage of a higher-attendance ISM.
- **Attendance by Weekday/Weekend and Design Day Implications:** Weekend visitors are estimated to account for an average of about half of all visitors each week. The weekend day estimate helps to lead to a design day calculation. A design day is a higher than average day in a higher attendance month (estimated at 10% above average), and

leads to an estimate of the required occupancy level, the number of people in the ISM building at one time, estimated at 30% of visitors on the design day.

- Attendance by Ticket Category:** The table sets out rounded order of magnitude estimates of attendance by ticket category, which are estimated to remain in the same general range for all five years projected. This includes adults (25-61) as the largest single ticket category, followed by free admission school groups, children and veterans combined at the same admission price point, then seniors and other ticket categories. Some 14% of all visitors are in an unpaid/indirect paid category that will also include indirect paid members, programs and rentals visitors.

The resultant attendance projections are summarized in the following table.

Projected On-Site ISM Attendance (rounded)	Base	Year 1	Year 2	Year 3	Year 4	Year 5	Base	Year 1	Year 2	Year 3	Year 4	Year 5
Projected Total On-Site Attendance							39,600	115,000	100,000	95,000	115,000	90,000
Attendance by Main Segment												
Residents (Boise MSA)	45%	55%	45%	40%	45%	40%	17,820	63,250	45,000	38,000	51,750	36,000
School Groups	25%	20%	20%	20%	20%	20%	9,900	23,000	20,000	19,000	23,000	18,000
Tourists	30%	25%	35%	40%	35%	40%	11,880	28,750	35,000	38,000	40,250	36,000
Total	100%	100%	100%	100%	100%	100%	39,600	115,000	100,000	95,000	115,000	90,000
Attendance by Weekday/Weekend												
Weekdays	50%	50%	50%	50%	50%	50%	19,800	57,500	50,000	47,500	57,500	45,000
Weekend Days	50%	50%	50%	50%	50%	50%	19,800	57,500	50,000	47,500	57,500	45,000
Total	100%	100%	100%	100%	100%	100%	39,600	115,000	100,000	95,000	115,000	90,000
Design Day Calculation												
Total Projected Attendance								115,000	100,000	95,000	115,000	90,000
Total Weekend Day Attendance								57,500	50,000	47,500	57,500	45,000
Average Weekend day Attendance								553	481	457	553	433
Weekend day Attendance in Higher Attendance Month (10% above average)								608	529	502	608	476
Maximum Number of People in Building at One Time (30% of daily total)								182	159	151	182	143
Attendance by Ticket Category												
Adult (25-61)		30%	30%	30%	30%	30%		34,500	30,000	28,500	34,500	27,000
Senior (62+)/Youth (13-24)		15%	15%	15%	15%	15%		17,250	15,000	14,250	17,250	13,500
Child (3-12)/Veterans/Weekday Afternoon		20%	20%	20%	20%	20%		23,000	20,000	19,000	23,000	18,000
School Group		20%	20%	20%	20%	20%		23,000	20,000	19,000	23,000	18,000
Non-School Group		1%	1%	1%	1%	1%		1,150	1,000	950	1,150	900
Indirect Paid /Unpaid		14%	14%	14%	14%	14%		16,100	14,000	13,300	16,100	12,600
Total		100%	100%	100%	100%	100%		115,000	100,000	95,000	115,000	90,000

5.2 PROJECTED OPERATING REVENUES

Projections of operating revenues during the first five years of operation of the revitalized Idaho State Museum (ISM) are set out in the following categories:

- Regular Admissions
- Surcharged Admissions for 4-Month Temporary Exhibition in Year 4;
- Retail Sales;
- Facility Rentals;
- Membership;
- Public and Educational Programs;
- Other Earned Revenue;
- Assumed Private Offset of Exhibition Costs;
- Assumed State Offset of Building Occupancy Costs;
- Existing State Support.

5.2.1 Regular Admissions

The following table sets out projected attendance levels by ticket category and assumed admission charges over the five years projected. The assumption is that admission charges will increase somewhat in Year 3. The projections also assume that value added discounts in collaboration with other museums and other discounts with hotels, AAA and others and implementation of the weekday afternoon discount will help to increase attendance but result in lower admissions revenue per visitor. We estimate a 10% reduction in admissions revenue as a consequence of these and other discounts. These estimates and assumptions lead to the following projections for the first five years of operation of the new ISM.

Regular Admissions Revenue	Charges		Year 1	Year 1	Year 2	Year 2	Year 3	Year 3	Year 4	Year 4	Year 5	Year 5	
	Base	Years 1-2	Attendance	Admissions	Attendance	Admissions	Attendance	Admissions	Attendance	Admissions	Attendance	Admissions	
Adult (25-61)		\$10.00	\$11.00	34,500	\$345,000	30,000	\$300,000	28,500	\$313,500	34,500	\$379,500	27,000	\$297,000
Senior (62+)/Youth (13-24)		\$8.00	\$9.00	17,250	\$138,000	15,000	\$120,000	14,250	\$128,250	17,250	\$155,250	13,500	\$121,500
Child (3-12)/Veterans/Weekday after 2 p.m.		\$5.00	\$6.00	23,000	\$115,000	20,000	\$100,000	19,000	\$114,000	23,000	\$138,000	18,000	\$108,000
School Group		\$0.00	\$0.00	23,000	\$0	20,000	\$0	19,000	\$0	23,000	\$0	18,000	\$0
Non-School Group		\$7.00	\$8.00	1,150	\$8,050	1,000	\$7,000	950	\$7,600	1,150	\$9,200	900	\$7,200
Indirect Paid /Unpaid		\$0.00	\$0.00	16,100	\$0	14,000	\$0	13,300	\$0	16,100	\$0	12,600	\$0
Total Revenue (before discounts)					\$606,050		\$527,000		\$563,350		\$681,950		\$533,700
Total Revenue (after discounts)	\$69,100			115,000	\$545,445	100,000	\$474,300	95,000	\$507,015	115,000	\$613,755	90,000	\$480,330
Average Revenue per Visitor					\$4.74		\$4.74		\$5.34		\$5.34		\$5.34

5.2.2 Surcharge for Major Exhibition in Year 4

It has been assumed that a major level temporary exhibition will be offered by the ISM every three years, but because of the higher attendance in the opening year, the first major exhibition will be held in Year 4. It will be for a 4-month duration and visitors will pay a \$5.00 surcharge in all ticket categories with the exception of members who will be provided with free admission

to the major exhibition as a benefit of membership. Other temporary exhibitions mounted by the ISM each year will be included in the regular admission price.

The attendance level at each major exhibition will depend on its nature and appeal, which cannot be known at this time. The projections therefore assume a level of appeal that will increase overall attendance at the ISM in Year 4 and result in 25% of annual visitors attending, or 28,750 visitors to the major exhibition over the 4-month period. We further estimate that members, VIP and other visitors who attend the major exhibition for free will reduce the paid total to 25,000 visitors at \$5.00, or a surcharged amount of **\$125,000 in Year 4**.

5.2.3 Retail Sales

In the year before closing the ISM reported retail sales of about \$45,400. At a reported 39,600 visitors that translated to about \$1.15 per visitor or \$54 per sq. ft. at 841 nsf of public retail space. While the size of the retail store will not change the higher levels of attendance will expose more visitors to it. There will also be opportunities for sales to non-visitors in Julia Davis Park for other reasons. With an enhanced web site there should be opportunities for internal sales as well, including the plush two-headed calf.

Our estimates take museum industry averages into account and are based on sales per visitor and projected at \$1.40 in Year 1 and growing by 1% per year to take into account better product and market knowledge over time. Retail cost of goods sold, staffing and other overhead costs are included with those expense projections later in this chapter. These estimates lead to the following retail sales projections.

Retail Sales	Base	Year 1	Year 2	Year 3	Year 4	Year 5
Total Public Retail Space (nsf)	841	841	841	841	841	841
Total Attendance	39,600	115,000	100,000	95,000	115,000	90,000
Sales per Visitor	\$1.15	\$1.40	\$1.41	\$1.43	\$1.44	\$1.46
Total Retail Gross Sales	\$45,400	\$161,000	\$141,400	\$135,673	\$165,878	\$131,116
Sales per Sq. Ft.	\$53.98	\$191.44	\$168.13	\$161.32	\$197.24	\$155.91

5.2.4 Facility Rentals

Prior to closing in FY2014 the ISHM generated only about \$8,000 from facility rentals. The reopened ISM will have a much stronger focus on facility rentals. This includes a 3,185 sf lobby space and a 3,335 multi-use space that will include an historic oak bar, stained glass dome and historic piano. The capacity for rentals is in the range of 200 seated and twice that number for receptions. Other smaller spaces include classrooms to be available for weekend birthday parties.

Some rentals would be at full commercial rates and others at a discounted rate non-profits and for State of Idaho agencies. Although the extent of rentals may vary widely, for the purposes of these projections we estimate an average of one major rental per week in Year 1 with growth over time. We also estimate an average revenue per major rental at \$1,500 in Year 1, including a commission on catering, with a modest 2% growth in subsequent years. And we assume revenues from smaller rentals at 10% of the revenues from major rentals. This leads to the following projections.

Rentals	Base	Year 1	Year 2	Year 3	Year 4	Year 5
Total Major Rentals per Year		50	60	65	65	70
Average Revenue per Major Rental		\$1,500	\$1,530	\$1,561	\$1,592	\$1,624
Total Income from Major Rentals		\$75,000	\$91,800	\$101,439	\$103,468	\$113,655
Income from Smaller Rentals		\$7,500	\$9,180	\$10,144	\$10,347	\$11,366
Total Rentals Income	\$8,000	\$82,500	\$100,980	\$111,583	\$113,815	\$125,021

5.2.5 Membership (Agency Wide)

There are two main motivations for membership at museums. One is value for money spent in receiving free admission and discounts on retail items, rentals, charged public programs and other benefits of membership. Such members are generally in lower level categories. The second motivation for membership is love of the institution and its mission and/or civic pride. Such members tend to be in upper level categories.

The Agency membership program, which covered both the ISHM and the Old Pen, had a very modest 220 memberships before the Museum closed in 2014. With total reported Agency revenues of \$16,100 this translates to \$73.18 per membership. The key recommendations/assumptions associated with membership when the Idaho State Museum reopens include two **components of the same membership program, with lower level membership in the “Idaho State Museums” and upper level memberships continuing to be in the Society. Other changes** include deleting reference to children **“under 18” residing in the same home, the option of a 2-year membership, and guest passes for upper level members that include an option of having them distributed in their name to those in financial need through social service agencies, religious institutions and schools in return for a tax receipt.**

Our projections of membership levels and average revenue per membership take into account the experience of other museums. This includes the following data:

- As shown in Chapter 2.1.1, members account for 1.3% of visitors to larger history museums **and 2.1% for children’s museums.** Assuming the lower 1.3% for the ISM suggests 1,300 memberships in the stabilized Year 3.
- The Discovery Center of Idaho reports 4,000 memberships, accounting for 3.6% of total attendance. The data are skewed by the fact of one member per membership when the common average is about three persons per membership and therefore memberships at about 1.2% of total attendance. At \$90 per membership and an admission charge of \$10 per person, that suggest members attend many times per year to make the cost of membership worthwhile. Membership revenue at the Discovery Center is a very substantial \$360,000, or 24% of the total \$1.5 million operating budget. Although it will **add a children’s creative gallery, the ISM will not have the same level of repeat visitation as the Discovery Center and therefore a lower percentage of memberships as a percentage of total operating revenues.**
- Zoo Boise reports 4,000 household memberships while the Idaho Botanical Garden reports 5,000 memberships or 8,500 individual members at \$40 per membership, largely because membership is required to achieve first access to the concert series.

- The membership levels at the three participating comparable museums set out in Chapter 2 ranged from about 700 to 1,400 to 2,100, confirming opportunities for increased levels of membership at the reopened ISHM.

Our estimates of membership levels at the Idaho State Museum are that they will mirror attendance patterns with peak membership at opening and in Year 4 with assumed introduction of a charged admission four-month major temporary exhibition. We estimate that the average membership revenue per membership will increase to \$115, and grow each year as more lower level members are enticed to move up to upper levels. This leads to the following projections.

Membership (Agency Wide)	Base	Year 1	Year 2	Year 3	Year 4	Year 5
Total Memberships	220	1,500	1,400	1,300	1,500	1,300
Average Revenue per Membership	\$73	\$115	\$117	\$120	\$125	\$126
Total Membership Revenue	\$16,100	\$172,500	\$163,800	\$156,000	\$187,500	\$163,800

5.2.6 Public and Educational Programs

Most public and educational programs are included with the price of admission. The ISHM generated about \$6,500 from charged public and educational programs in 2014. There is an opportunity to increase this amount in the context of the reopened facility. This includes staff and docent guided programs for school groups that otherwise receive free basic admission, behind the scenes tours, themed events, charged registered programs and other programs to be developed by management. Although the amounts may vary widely we have assumed a rounded 10% ratio of program to admissions revenue each year, compared to the 9.4% that was in place in 2014. This leads to the following projections.

Public and Educational Programs	Base	Year 1	Year 2	Year 3	Year 4	Year 5
Admissions Revenue	\$69,100	\$545,445	\$474,300	\$507,015	\$613,755	\$480,330
Program Revenue as % of Admissions	9.4%	10.0%	10.0%	10.0%	10.0%	10.0%
Total Revenue	\$6,500	\$54,545	\$47,430	\$50,702	\$61,376	\$48,033

5.2.7 Other Earned Revenue

There are a variety of opportunities to generate additional earned income. This study has identified pay-for-photo opportunities based on costume rental and interactive donation boxes. Other initiatives may be developed by management over time and could range from vending machines to the rental of exhibitions developed by the Agency to other institutions. For the purposes of these projections we estimate that earned revenue from other sources will increase after the opening year and remain in the same general range with the exception of additional opportunities created by the major exhibition in Year 4.

Other Earned Revenue	Base	Year 1	Year 2	Year 3	Year 4	Year 5
Total Revenue	\$0	\$10,000	\$20,000	\$20,000	\$25,000	\$20,000

5.2.8 Assumed Private Offset of Exhibition Costs

It is difficult for state history museums to generate substantial support from private sources but is more likely to be for exhibitions as opposed to general support. Our assumption is that private sources will raise funds each year sufficient to offset the non-staff costs projected later in this chapter for exhibitions, including routine maintenance, temporary exhibitions and an annual reserve to help pay for changes to the core exhibitions over time. Costs and therefore the revenue offset from private supporters will need to be highest in Year 4. The projections are therefore as follows.

Assumed Private Offset of Exhibition Costs	Base	Year 1	Year 2	Year 3	Year 4	Year 5
Total Revenue		\$120,000	\$150,000	\$152,000	\$355,000	\$155,000

5.2.9 Existing State of Idaho Support

The state of Idaho is the primary funder of the Agency, as is the case with other state museums across the country. The state appropriation was **\$562,600** in FY14, the last operational year of the Museum. For the purposes of these projections the FY2014 amount has been assumed to be continued at this level for each year projected.

5.2.10 Assumed State Offset of Building Occupancy Costs

It has been assumed that the State of Idaho will absorb the non-staff building occupancy costs of the reopened ISM, as shown in the following table.

Assumed State Offset of Occupancy Costs	Base	Year 1	Year 2	Year 3	Year 4	Year 5
Total Revenue		\$293,700	\$312,396	\$317,070	\$355,766	\$326,418

5.3 PROJECTED OPERATING COSTS

There are eight categories of operating costs that have been projected for the Idaho State Museum (ISM) based on the assumptions set out in the previous chapter and the benchmark and base level data in earlier chapters. These are:

- Salaries, Wages and Benefits;
- Building Occupancy Costs;
- Exhibitions;
- Educational and Public Programming;
- Conservation/Curatorial;
- General and Administrative;
- Marketing;
- Retail Cost of Goods Sold.

Projections for each follow for the opening five years of operation.

5.3.1 Salaries, Wages and Benefits

The largest operating cost of any museum is staffing, generally accounting for 40-60% of the total operating budget. In FY2014, the last year of operation before the museum closed to the public, staffing costs totaled some \$542,800 in FY14, or close to 76% of the operating expenditures. This was higher than the average ratio due to the fact that some costs are absorbed by the Agency and not shown on the Museum operating budget. In addition, in advance of closing there was under-spending on exhibitions, programs and marketing expenditure categories.

As detailed in Chapter 4 the requirements of a higher quality reopened new Museum will require a growth in staffing levels. Additional staff resources will also be required in Year 4 when a major level temporary exhibition is assumed to be implemented at the ISM.

The additional Museum and Agency staff positions required to operate the new ISM are set out in the following table which combines salaries and benefits. Although all revenues and expenses are in 2017 constant dollars and assumed to grow at whatever the prevailing rate of inflation is, we have assumed that salaries, wages and benefits will grow at a rate of 0.5% per year above the prevailing inflation rate. These estimates and assumptions lead to the following projections.

Staffing Projections for Idaho State Museum (2017 dollars, rounded for Year 1)	FTE Year 1	FTE Year 2	FTE Year 3	FTE Year 4	FTE Year 5	Salary and Benefits per FTE	Year 1 Salary and Benefits Costs	Year 2 Salary and Benefits Costs	Year 3 Salary and Benefits Costs	Year 4 Salary and Benefits Costs	Year 5 Salary and Benefits Costs
Base Level Museum Salaries, Wages and Benefits	9.0	9.0	9.0	9.0	9.0		\$609,000	\$612,045	\$615,105	\$618,181	\$621,272
New Positions											
Museum											
Business/Enterprise Manager	1.0	1.0	1.0	1.0	1.0	\$69,000	\$69,000	\$69,345	\$69,692	\$70,040	\$70,390
Admissions	1.0	1.0	1.0	1.5	1.0	\$43,000	\$43,000	\$43,215	\$43,431	\$65,790	\$43,865
Bookings Clerk (rentals, education, group tours, other)	1.0	1.0	1.0	1.0	1.0	\$43,000	\$43,000	\$43,215	\$43,431	\$43,648	\$43,866
Weekend/Evening Allocation (part-time plus volunteers)	2.0	2.0	2.0	2.5	2.0	\$27,000	\$54,000	\$54,270	\$54,810	\$68,850	\$55,358
Retail/Information Staff (part-time plus volunteers)	2.0	2.0	2.0	2.5	2.0	\$27,000	\$54,000	\$54,270	\$54,810	\$68,850	\$55,358
Education Specialist	1.0	1.0	1.0	1.5	1.0	\$63,000	\$63,000	\$63,630	\$63,945	\$96,397	\$64,584
Curator	1.0	1.0	1.0	1.0	1.0	\$63,000	\$63,000	\$63,630	\$63,945	\$64,265	\$64,586
Sub-Total Museum	9.0	9.0	9.0	11.0	9.0		\$389,000	\$391,575	\$394,064	\$477,840	\$398,009
Agency											
Marketing/Communications Manager	1.0	1.0	1.0	1.0	1.0	\$69,000	\$69,000	\$69,345	\$69,692	\$70,040	\$70,390
Volunteer and Membership Coordinator	1.0	1.0	1.0	1.0	1.0	\$63,000	\$63,000	\$63,315	\$63,632	\$63,950	\$64,269
Maintenance	1.0	1.0	1.0	1.5	1.0	\$47,000	\$47,000	\$47,235	\$47,471	\$71,910	\$47,946
Sub-Total Agency	3.0	3.0	3.0	3.5	3.0		\$179,000	\$179,895	\$180,794	\$205,900	\$182,606
Total Additional Salaries/Wages and Benefits	12.0	12.0	12.0	14.5	12.0		\$568,000	\$571,470	\$574,858	\$683,740	\$580,615
Total Combined Salaries, Wages and Benefits	21.0	21.0	21.0	23.5	21.0		\$1,177,000	\$1,183,515	\$1,189,964	\$1,301,921	\$1,201,886

5.3.2 Occupancy Costs

Occupancy costs are generally defined to include all costs, excluding salaries, associated with building repairs and maintenance, utilities (gas, electricity, and water), security systems and building insurance. These costs vary depending on the age and quality of the building, the extent of electricity use and climatic conditions.

In FY2014, before the Idaho State Historical Museum closed to the public, occupancy costs totaled only \$72,300, or about \$2.09 per gross square foot based on the 34,670 gross square feet of the Museum before the current expansion. Some of these costs, including insurance, security systems, and elevator maintenance and data storage are absorbed by the Agency and this has been assumed to continue in the new facility. Another reason why occupancy costs were lower than common was deferred maintenance knowing the building will be renovated. These factors contributed to lower occupancy costs than the \$6-\$8 per gross square foot commonly found.

The project engineers expect a 20% gas cost saving as a result of a geothermal conversion of the building on reopening. With the new facility there will also be fewer repairs and maintenance, especially in the opening year when warranties will be in place. On the other hand, with more interactives and multimedia, there will be a substantial increase in electricity costs and the higher attendance will result in higher costs for other utilities.

Our estimates of applicable occupancy costs in the reopened ISM facility are based on a stabilized \$5.50 per gross square foot for Year 3 with modest increases in subsequent years and lower figures in the opening two years for the 46,470 gsf facility, especially with Year 1 under warranty. A larger amount is estimated in Year 4 as a consequence of the higher attendance associated with the 4-month major exhibition. These estimates and assumptions lead to the following projections.

In addition it has been assumed that janitorial and security services will be provided by contract as opposed to being staff positions. These costs have been allocated to occupancy cost estimates here as well and estimated at \$50,000 and \$60,000 per year respectively, in 2017 dollars, with higher amounts needed during the major exhibition in Year 4.

Occupancy Costs	Base	Year 1	Year 2	Year 3	Year 4	Year 5
Size of Facility (gross sq. ft.)	34,670	46,740	46,740	46,740	46,740	46,740
Costs per gsf	\$2.09	\$5.00	\$5.40	\$5.50	\$5.90	\$5.70
Sub-Total Occupancy Costs	\$72,300	\$233,700	\$252,396	\$257,070	\$275,766	\$266,418
Janitorial Staff Contract		\$50,000	\$50,000	\$50,000	\$60,000	\$50,000
Security Staff Contract		\$60,000	\$60,000	\$60,000	\$80,000	\$60,000
Total Occupancy Costs	\$72,300	\$293,700	\$312,396	\$317,070	\$355,766	\$326,418

5.3.3 Exhibitions

Non-staff expenses associated with permanent and temporary exhibitions are often a major operating expense category for Museums. In FY2014 the ISM allocated only \$26,000 to exhibitions, reflecting the knowledge that the Museum was to close at the end of the year.

The reopened ISM is assumed to include 17,485 nsf of exhibition space. There will be a need to allocate funds for routine maintenance, a maintenance contract for the high tech interactives and multi-media, as well as for temporary exhibitions, especially for a major 4-month temporary exhibition capable of being surcharged each year. Moreover, we believe it is important that the operating budget for exhibitions include a reserve that will build up over time to pay for exhibit refreshment and replacement over time.

- **Routine Maintenance:** With the opening year under warranty these costs will be minor but will grow over time. Our projections are set out in the following table.
- **Exhibit Maintenance Contract:** One option is to have staff in place to be able to provide immediate repairs for high tech interactives and multi-media. The assumed option is that a maintenance contract will be entered into to cover the full five-year period projected given the complexity of the equipment. We estimate a contract at \$40,000 per year.
- **Temporary Exhibitions:** The amounts required for the temporary exhibition will vary widely but have been assumed at \$50,000 each year with the exception of Year 1 in which a lesser investment should be possible given the newness of the Museum, and in Year 4 when a major exhibition is assumed that is capable of being surcharged. The cost for the major exhibition is estimated at \$225,000 with the annual total at \$250,000 in Year 4.
- **Reserve for Exhibition Replacement:** Rather than seeking to raise capital funds for changing the permanent exhibitions after a few years, it is better to allocate a specific amount as part of the operating budget starting in the opening year. We have estimated \$50,000 per year.

Our estimates for non-staff costs associated with exhibitions in the reopened ISM are therefore as follows:

Exhibition Costs	Base	Year 1	Year 2	Year 3	Year 4	Year 5
Routine Maintenance		\$5,000	\$10,000	\$12,000	\$15,000	\$15,000
Maintenance Contract		\$40,000	\$40,000	\$40,000	\$40,000	\$40,000
Temporary Exhibitions		\$25,000	\$50,000	\$50,000	\$250,000	\$50,000
Reserve for Exhibition Replacement		\$50,000	\$50,000	\$50,000	\$50,000	\$50,000
Total Costs	\$26,000	\$120,000	\$150,000	\$152,000	\$355,000	\$155,000

5.3.4 Educational and Public Programming

In FY2014 before closing the Museum allocated only \$10,000 to non-staff costs associated with educational and public programs based on revenues of \$6,500. That is, expenses were a little over 1.5 times the revenues generated.

It is common for non-staff programming costs to be 2-3 times higher than the revenues generated because such programs are important to the mission of the institution and are either included with the cost of admission or often offered below actual cost. Our assumption is that with an emphasis on cost control, the expenses associated with public and educational programs will be double the projected revenues. This leads to the following projections.

Public and Education Programming Costs	Base	Year 1	Year 2	Year 3	Year 4	Year 5
Total Costs	\$10,000	\$109,089	\$94,860	\$101,403	\$122,751	\$96,066

5.3.5 Conservation/Collections Care

Collections care expenses commonly include such non-staff items as conservation, collection handling supplies and equipment, digitization and photography. The ISM allocated about \$3,700 in FY2014. For the purposes of these projections we estimate that more funds will be allocated to conservation and collections care, especially for new supplies at opening.

Collections Care Costs	Base	Year 1	Year 2	Year 3	Year 4	Year 5
Total Costs	\$3,700	\$20,000	\$15,000	\$15,000	\$15,000	\$15,000

5.3.6 General and Administrative

Every institution has a varying definition of what is included in general and administrative costs. In general, they include office and related supplies, equipment, mailing, printing, information technology, telephone, travel, conferences, volunteer perquisites, professional services, dues and subscriptions, credit card fees, entertainment, and items that do not fit into the other expense categories. Depending on the definitions of what is included in General and Administrative Costs they commonly account for 10-15% of staffing costs since there is a relationship between such costs and staffing levels. The FY2014 operating budget of the Idaho State Historical Museum indicated only about \$10,000 in this category, in part because some costs like communications are Agency costs, and this is assumed to continue.

For the purposes of these projections we estimate general and administrative costs payable by the Museum at 10% of staffing costs in Year 1 to reflect initial purchases and in Year 4 associated with the major exhibition, and 8% of staffing costs in subsequent years. These assumptions and estimates result in the following projections.

General & Administrative	Base	Year 1	Year 2	Year 3	Year 4	Year 5
10/8% of staffing costs	\$10,000	\$117,700	\$94,681	\$95,197	\$130,192	\$96,151

5.3.7 Retail Cost of Goods Sold

In FY2014 the Museum spent \$32,800 on the retail cost of goods sold. That is about 72% of the \$45,400 in reported retail sales that year and was skewed by the fact the Museum was closing. The norm is for retail cost of goods sold to be in the range of 50-60% of retail sales. For the purposes of these projections, we estimate retail cost of goods sold will be 55% of sales each year. This leads to the following projections.

Retail Cost of Goods Sold	Base	Year 1	Year 2	Year 3	Year 4	Year 5
Total Costs (at 55% of sales)	\$32,800	\$88,550	\$77,770	\$74,620	\$91,233	\$72,114

5.3.8 Marketing

The Agency allocated only \$19,600 to marketing the Museum and the Old Pen and other sites combined. It is essential for investment in marketing be increased substantially at least for the ISM to help lead to the estimated higher attendance and earned income levels. As shown in Chapter 2, the median expenditure for history museums across the country was 50 cents per visitor in the last comprehensive AAM survey compared to an overall median of \$1.29 for all museum types.

The attendance projections assume a substantial increase in marketing expenditures that help to reinforce the basis for the higher projected attendance levels and to better serve a statewide mandate. For the purposes of these projections we estimate \$0.95 per visitor to the reopened ISM, with the higher expenditures in Year 1 reflecting opening year celebrations. An increased allocation of \$1.25 per visitor is estimated in Year 4 to market the major exhibition. These assumptions and estimates lead to the following projections.

Marketing	Base	Year 1	Year 2	Year 3	Year 4	Year 5
Total Costs (\$.95/\$1.25 per visitor)	\$19,600	\$109,250	\$95,000	\$90,250	\$143,750	\$85,500

5.4 SUMMARY OF ATTENDANCE AND FINANCIAL PROJECTIONS

The following table summarizes our projections of attendance, operating revenues and costs for the Idaho State Museum (ISM) in the initial five years of operation of the reopened and substantially enhanced facility.

Attendance levels are estimated to grow from the base level of under 40,000 visitors in the last full year of operation to 115,000 visitors in the opening year of the new ISM. This will be followed by a common attendance decline in the next two years until an assumed major temporary exhibition in Year 4 helps to restore the attendance to opening year levels. There will then be a common decline to the 90,000 visitor range. Year 3 is assumed to be the stabilized attendance year at 95,000 annual visitors and representative of attendance levels in future years.

The total operating annual budget, in 2017 dollars, of the ISM is projected to grow from about \$717,000 in FY2014 to the \$2.0 million range except in Year 4 when higher costs associated with the major temporary exhibition cause the operating budget to increase to over \$2.5 million. As is common with museum expansions and enhancements, the staffing and other operating expenses will increase far more substantially than will the earned income that may be generated. To offset these higher costs, three key assumptions have been identified that will allow for a generally breakeven operation. The first is that the cash amount provided by the state of Idaho will be maintained at FY2014 levels. The second is that the state will absorb the building occupancy costs of the state-owned ISM, and the third is that private funding support will pay for the non-staff exhibition costs of the Museum. Based on these assumptions the projections indicate close to a breakeven operation each regular year, and a small surplus in Year 4 assuming more private funding for the major exhibition.

Summary of Projections (rounded)	Base	Year 1	Year 2	Year 3	Year 4	Year 5	Base	Year 1	Year 2	Year 3	Year 4	Year 5
								%	%	%	%	%
Total On-Site Attendance	39,600	115,000	100,000	95,000	115,000	90,000						
Projected Operating Revenues												
Regular Admissions Revenue	\$69,100	\$545,445	\$474,300	\$507,015	\$613,755	\$480,330	9.8%	27.2%	24.0%	25.2%	23.9%	23.9%
Major Exhibition Surcharge	\$0	\$0	\$0	\$0	\$125,000	\$0	0.0%	0.0%	0.0%	0.0%	4.9%	0.0%
Retail Sales	\$45,400	\$161,000	\$141,400	\$135,673	\$165,878	\$131,116	6.4%	8.0%	7.2%	6.7%	6.5%	6.5%
Rentals	\$8,000	\$82,500	\$100,980	\$111,583	\$113,815	\$125,021	1.1%	4.1%	5.1%	5.5%	4.4%	6.2%
Membership (Agency Wide)	\$16,100	\$172,500	\$163,800	\$156,000	\$187,500	\$163,800	2.3%	8.6%	8.3%	7.8%	7.3%	8.1%
Public and Educational Programs	\$6,500	\$54,545	\$47,430	\$50,702	\$61,376	\$48,033	0.9%	2.7%	2.4%	2.5%	2.4%	2.4%
Other Earned Income	\$0	\$10,000	\$20,000	\$20,000	\$25,000	\$20,000	0.0%	0.5%	1.0%	1.0%	1.0%	1.0%
Assumed Private Offset of Exhibition Costs		\$120,000	\$150,000	\$152,000	\$355,000	\$155,000	0.0%	6.0%	7.6%	7.6%	13.8%	7.7%
Assumed State Offset of Occupancy Costs		\$293,700	\$312,396	\$317,070	\$355,766	\$326,418	0.0%	14.7%	15.8%	15.8%	13.9%	16.2%
Existing State Support	\$562,600	\$562,600	\$562,600	\$562,600	\$562,600	\$562,600	79.5%	28.1%	28.5%	28.0%	21.9%	28.0%
Total Projected Revenues	\$707,700	\$2,002,290	\$1,972,906	\$2,012,643	\$2,565,690	\$2,012,318	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Projected Operating Expenses (excluding depreciation)												
Salaries, Wages, Benefits	\$542,800	\$1,177,000	\$1,183,515	\$1,189,964	\$1,301,921	\$1,201,886	75.7%	57.8%	58.5%	58.5%	51.8%	58.7%
Occupancy	\$72,300	\$293,700	\$312,396	\$317,070	\$355,766	\$326,418	10.1%	14.4%	15.4%	15.6%	14.1%	15.9%
Exhibitions	\$26,000	\$120,000	\$150,000	\$152,000	\$355,000	\$155,000	3.6%	5.9%	7.4%	7.5%	14.1%	7.6%
Programs	\$10,000	\$109,089	\$94,860	\$101,403	\$122,751	\$96,066	1.4%	5.4%	4.7%	5.0%	4.9%	4.7%
Collections Care	\$3,700	\$20,000	\$15,000	\$15,000	\$15,000	\$15,000	0.5%	1.0%	0.7%	0.7%	0.6%	0.7%
General & Administrative	\$10,000	\$117,700	\$94,681	\$95,197	\$130,192	\$96,151	1.4%	5.8%	4.7%	4.7%	5.2%	4.7%
Retail Cost of Goods Sold	\$32,800	\$88,550	\$77,770	\$74,620	\$91,233	\$72,114	4.6%	4.4%	3.8%	3.7%	3.6%	3.5%
Marketing	\$19,600	\$109,250	\$95,000	\$90,250	\$143,750	\$85,500	2.7%	5.4%	4.7%	4.4%	5.7%	4.2%
Total Projected Expenses	\$717,200	\$2,035,289	\$2,023,222	\$2,035,504	\$2,515,613	\$2,048,135	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Surplus/ (Deficit)	(\$9,500)	(\$33,000)	(\$50,316)	(\$22,861)	\$50,076	(\$35,817)	-1.3%	-1.6%	-2.5%	-1.1%	2.0%	-1.7%

APPENDIX A: ACKNOWLEDGEMENTS

We acknowledge here all of those who took part in the Assumptions Workshop or who were interviewed as part of this study. Special thanks to Ryan Gerulf for organizing our trip, scheduling the workshop and interviews and assisting consultants Ted Silberberg and Brad King throughout the study process, and to Executive Director Janet Gallimore for her leadership.

Assumptions Workshop, Internal Interviews and Board Members

- Amber Beierle, Visitor Services and Education Coordinator
- Tricia Canaday, Deputy State Historic Preservation Officer
- Dax Chizum, Grants Manager
- Fred Frichman, Exhibition Designer
- Janet Gallimore, Executive Director
- Ryan Gerulf, Development Administrator
- Ernie Hoidal, Trustee, District 4*
- Jenaleigh Kiebert, Archivist
- Layce Johnson, Archivist
- Rachelle Littau, Curator
- Rosemary McClenahan, Fiscal Officer
- Jody Ochoa, Museum/Old Idaho Penitentiary Director
- Sarah Phillips, Curator
- Kim Taylor, Store Manager
- Laurel York-Odell, Project Coordinator

(Note: * Board member. All others are Agency staff)

External Interviews

- Mary Ann Arnold, Treasurer, Foundation for Idaho History
- Patricia Canto, Cross-Cultural Facilitator, Saleluz Inc.

- Lynnette Chandler, Board Member, Friends of the Museum
- Roy Eiguren, Museum Campaign Chair
- Lori Gash, Curriculum Coordinator, West Ada School District
- Sara Focht, President, Boise Museum Association and Education Program Coordinator, Morrison-Knutson Nature Center
- Jill Gill, History Professor, Boise State University
- Odette Gutierrez, Cultural Affairs Director, Mexican Consulate
- Cathy Holland Smith, Budget Manager, Idaho Legislature
- Shelby Kerns, Budget Bureau Chief, Idaho Division of Fiscal Management
- Liz Littman, Assistant Director, Boise Zoo
- Robyn Lockett, Principal Budget Policy Analyst, Idaho Legislature
- Eric Miller, Executive Director, Discovery Center of Idaho
- Toni Neilsen, Regional President, Zions Bank
- Marty Petersen, President, Foundation for Idaho History
- Kristin Prieur, Campaign Fundraising Consultant
- Roger Quarles, Executive Director, Albertson Family Foundation
- Jani Revier, Administrator, Idaho Division of Fiscal Management
- Nancy Richardson, International Tourism Specialist, State Office of Tourism
- Anna Maria Schachtell, Director of Stay in School Program, Hispanic Cultural Center
- Nick Stout, Communications Director for Governor Otter
- Chris Taylor, Curriculum Director, Boise School District
- Gideon Tolman, Financial Management Analyst, Idaho Division of Fiscal Management
- Gloria Toticaguena, President, Idaho Policy and Consulting
- Carrie Westergard, Executive Director, Boise Convention and Visitors Bureau
- Alice Whitney, President, Idaho Hispanic Business Association
- Christine Wiersema, Executive Director, Idaho Botanical Garden
- Kalie Wright, Communications Director for First Lady Otter



**ISHS Museum Renovation
Statewide Focus Groups Outreach, Research Results and Report of Findings**

December 6, 2015

**Idaho Policy and Consulting
Dr. Gloria Totoricagüena**



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Essential Findings

After combining the results of over eighteen months of engagement and collaboration with specialists, local historians, business, educators and the general public the following data from the quantitative and qualitative exercises conclude:

- **ISHS is expected to be fundamental to the educational mission of Idaho.** 100% of the qualitative research results asked for ISHS leadership to direct a consortia of Idaho's local museums and collectors for statewide access and exchange of traveling educational exhibits for the general public and local k-12 students. Data showed constantly changing content will attract repeat and more engaged visitors, and promote sense of identity and past-present understanding of human development- both of which are at the heart of critical thinking and resilient democratic communities.
- **ISHS's leading role in teaching historical literacy is central to Idaho's identity.** ISHS collections, experts and networks are used by international, national, state and local governments, educators, tourists, researchers, Chambers of Commerce, business attraction, community associations, families and individuals. ISHS is the go-to institution for activities, information and trusted records about Idaho. Participants expect ISHS to have accurate, interesting and impactful exhibits and collections, and for it to be able to interlink myriad stakeholders.
- **ISHS is a highly trusted and respected Idaho public institution.** Transparency in budgets, planning, process, public involvement and outreach resulted in 94% saying they will speak favorably about the ISHS and the Museum project with their family and colleagues, and 94% saying they plan to travel to Boise for the opening of the Museum in 2017.
- **Idaho's individuals and institutions want increased access to ISHS and the Museum via technology.** They expect a robust website with digital audio, video, photography, digitized primary source documents, and real-time research and interactivity possibilities. A majority of ISHS visitors are virtual visitors, and Idahoans from around the state want and expect the latest technology to be used to advantage for those who cannot experience the collections in person.
- **100% of focus group participants have asked for continued engagement from ISHS and want to give input to the Museum renovation and ISHS outreach efforts.** They asked for ongoing updates and developments through the legislative sessions, design, build-out and to continue as engaged stakeholders.
- **Business, elected local officials and community participants agreed that they want the Museum as a physical and virtual anchor showpiece for Idaho's business attraction, tourism, education, community historical literacy and pride in our state.**
- **Overwhelmingly, 96% of participants believe the renovation will result in increased attendance.** Results demonstrate the new Museum design accurately represents the important content of each region's past and present, has interesting and impactful exhibits and plans for technology, multi-media and virtually enhanced experiences. Participants request that themes focus less on geography and more on the similarities and common threads among Idaho's resources, peoples, communities and events.
- **The ISHS Museum and collections renovations are expected to use this once-in-a-generation opportunity to enhance ties among Idaho's various regional identities and to correct inaccurate misperceptions about our people, resources and controversial events.**
- **Idahoans are the most motivated to visit our Museums by exhibits and collections about our Native Peoples, and in order to hear expert guest speakers.**

Executive Summary

Between July and November 2015, the Director and staff of the ISHS and consultant Dr. Gloria Totoricagüena conducted nine separate focus group exercises in Coeur d'Alene, Lewiston, McCall, Boise, Hailey (two different groups on the same day), Twin Falls, Pocatello and Idaho Falls. Results of both the quantitative data and the qualitative data from oral discussions and free writing opportunities during the individualized survey are included in the three appendices of this final report. Printed results are also gathered at the ISHS main office in Boise and include several hundred pages of data.

This report is based upon the analyses of the quantitative and qualitative data, organized in to a statewide database by combining the questions that were asked of everyone, and also separating out the region-specific content and ranking questions for geographic comparative information. The appendix data charts show statewide results first, followed by each region's results for comparisons. This was necessary and useful to look for discrepancies amongst the regions and for accurate focused recommendations of where and on which topics additional work could benefit the ISHS program. The region-specific content ranking and open writing answers will assist the decision making for content, design, process and also for cost budgeting.

Statewide, at every one of the nine exercises, the most repeated comment was to thank the Director and the team for taking the outreach efforts and for valuing the audience's individualized and confidential input. This initiative -without qualifications- created positive relations around the state with important stakeholders in varied communities. The process used to protect anonymity and confidentiality have added reliability to the data. At each event, people repeated that they had never participated in such an exercise before and were happy to be able to give their own opinions and input, rather than having to listen to others who might have a tendency to dominate a discussion. This process could be considered again for future exercises. Also repeated at every event was the second request to create (or strengthen) a statewide network, led by ISHS, of local museums and collections to assist each other and to create ongoing roving temporary exhibits. Participants clearly want and expect leadership from ISHS. They also want to stay engaged with ISHS. The third request also heard at every event was to create exhibits and collections that find common experiences and ties among the various regions of Idaho, and specifically not to use "North" and "South" as descriptors.

I have created three categories where I believe the data can give guidance for continued consideration by ISHS and the design team: 1.) content of the exhibits, 2.) design of the exhibits and overall interior, and 3.) the process for continued outreach and public relations for ISHS. These are summaries of the repeated written and discussed ideas, concerns and suggestions. The detailed answers are available in the appendix and from the ISHS offices.

Following are the highlighted quantitative and qualitative data from closed questions, free-writing and open discussions results from the nine Focus Group exercises conducted in Coeur d'Alene, Lewiston, McCall, Boise, Hailey (two exercises held on the same day), Twin Falls, Pocatello and Idaho Falls.

Participants' Content-Related Results and Recommendations

- Native Peoples artifacts and past/present stories are the top theme of interest. Explain their political sovereignty. Regardless of the topic, tribal impact/actions/reactions could be included in descriptions and/or in additional digital information possibilities.
- Design and content must find a way to link content/theme similarities regardless of geography (agriculture in all three regions, mining in all three regions, recreation in all three regions, etc.).

Participants have a strong and often emotional expectation that the content and design will decrease “North” and “South” identity differences.

- Exhibits should draw connections between the past and the present, not only educate about the past. Give explicit examples of how past events have shaped today’s results. Ex: agriculture creates a great pathway for Idaho as a nationally known agri-tech and food manufacturing state.
- Labels and titles are of significant impact for accuracy, emotional connection and interest. None of the draft titles had participant approval. There is higher positive acceptance and preference for indicating titles that do not use directional adjectives (no “North”, no “Middle” no “South”). Use of flora and fauna, topography or other categories of positive adjectives of the people such as “Character” “Perseverance” “Ingenuity” are preferred.
- Data regarding the treatment of controversial events/topics point to 94% agreement that they must be included using the primary source words and artifacts of the people and institutions involved, and are inconclusive regarding how the events should be best described and explained. Final decisions will benefit from close attention to the data from the eight questions’ responses and the free writing responses.
- Draft themes were considered to be representative, interesting and impactful for each region. “Strongly agree” and “Agree” data combined results show: Boise 80%, Hailey 95%, Idaho Falls 85%, Lewiston 68%, McCall 85%, CdA 58%, Pocatello 75%, Twin Falls 90%. Statewide overall is 79%. However, 1/3 of participants were still unsure or disagreed that this draft design included the most important themes for the entire state.
- Additional content consideration, outreach and engagement could focus on the northern region where only 58% of participants agreed that their draft themes are representative, interesting and impactful. Particular attention should be given to their written and discussion comments in the appendix. Requested improved accuracy in terminology and descriptions used; more information about native peoples’ and more recent communities and industry and the interplay of interests and land stewardship by the native peoples; importance of the Coeur d’Alene Resort, recreation, trails, water, hydroplane races, National Scout Jamboree and tourism to their lifestyle and economy; agriculture; Fort Sherman; religious missions; aerospace industry, aviation and Dr. Forrest Byrd’s respiratory inventions and his aviation museum.
- “Mountainous Middle” participants thought their section themes were “boring”. Suggested content includes: mining and forestry issues; whitewater and hot springs; managing nature (re-introduction of wolves, salmon protections); significance of the Chinese and Latino populations in economic development; Hemingway and various writers and artists; animal diversity in central Idaho not found in other areas; more profound treatment of primitive and protected areas impacts and comparison to other states/countries (conflict, economic, social, political, community development, media biases, world leaders in nature protection); Bethine Church’s leadership in nature preservation.
- Participants are motivated to visit a museum with expectations to learn something new (97%) and are unlikely to be repeat visitors unless there are consistently new temporary exhibits. They expect a full intellectual and emotional learning experience (87%), and to see authentic/exotic artifacts (85%).
- Top motivating factors for visiting an Idaho Museum are 1.) Native Peoples artifacts/themes from past and present, and 2.) to hear a well-known guest speaker.
- Participant free-writing suggestions for using museum exhibit content to promote the best of Idaho say stories should relay the high quality of life, healthy lifestyle related to easy access to nature, friendliness of Idahoans, ethics and moral standards of Idaho’s communities, pioneer spirit and perseverance, more ethnic diversity than typically assumed, importance of women. They should be interwoven throughout, not separate stories.

- Representation should include women (ex. Boise parks are named after women) and ethnic minorities, especially Basques, Mexican and Latinos, Japanese and Chinese, and consistent inclusion of the impact from/on Native Peoples in the various exhibits and collections.
- Content should include military heroes, athletes, musicians, writers, tribal leaders, elected officials database, scientists, inventors, and the role of women throughout.
- Within the agricultural story include the economics of migrant labor, dairy, fisheries, cattle, onions, sugar, corn, fertilizer, Zamzows, seed producers, Japanese, Latinos, role of women as business and work partners in farming and ranching, ag equipment manufacturers in Idaho.
- In Urbanization sections, include more than Boise and Pocatello on the bike ride Allow the visitor to click on a town and ride through as many as possible.
- Much more needed on Idaho Falls and INL, and how INL leads the world in energy research and has brought additional ethnic diversity to the area.
- Development of Idaho's universities and colleges, and rural vs urban education.
- Rural vs urban challenges and influence in politics, business development, urban sprawl, fire fighting in forest interface areas, nature protection. Rural transportation, education, electrification, broadband etc.
- Idaho's philanthropists and Idaho high volunteerism data.
- In recreation, extend concept to our urban centers' "Greenbelts", ie throughout Kootenai County, Boise, Eagle and Meridian, Twin Falls canyon rim, etc. All point to a healthful lifestyle.
- Attempt to dispel misconceptions about events, people, and regions by calling them out. EX: "All southern Idaho is not Mormon" is repeatedly offered as a misconception about the south. Somewhere in the exhibit give US Census data about the people of Idaho, including religions, ethnicities, languages spoken, etc..
- In mining, include the amounts of silver, gold and lead and other minerals produced from Idaho resources throughout the state and include the environmental impacts.
- Relay the high quality of life indicators and Idaho's placement on those measurements.

Participants' Design-Related Results and Recommendations

- Create exhibits that demonstrate commonalities and depict similarities among the regions of Idaho. This is an opportunity to dissolve the mental divisions among "North" and "South" Idahoans.
- Labels and titles have a significant impact. Use the newly created participant network to test new titles and labels. Titles for the North should be tested with a wider range of participants for representation and data accuracy.
- Use of Native American languages and Idaho's immigrants' languages is encouraged in signage, titles, audio, micro-experiences and digital information.
- Participants reported high approval (94%) for the opening "Origins" section thematic treatment of all of Idaho together and not regionalized, with various interactive and media experiences.
- 60% statewide agreed that immersive experiences are worth the cost and removal of other things, however there were significant disparities of regional data, ie Idaho Falls agreed 84% to Pocatello's 33%, and 52% agree that technology driven micro-experiences are effective for a good Museum experience. Technology requires maintenance and trained staff if something goes wrong.
- A robust and functional website is essential- quality is better than quantity of information, and will likely entice repeat visitors.
- ADA requirements, adaptive technologies for other-abled, and plentiful seating were mentioned in every discussion.

- Suggestions/requests for access to quality food and drink refreshment, with local Idaho products whenever possible. The size of this refreshment space and a large selection of products were not as important as “showcase Idaho products”.
- Museum websites were used by half of these participants fewer than 3 times in the last 5 years. Most use Google searches to obtain information and had not thought of going to a Museum website. This may be a result of the older ages of the focus group participants. Written comments showed the opposite—that youth expect technology and younger visitors do use webpages for information. Webpage design preferences included maximum use of photography, digitized documents, and constant updating. A robust facebook page that people can “like” and “follow” was also suggested as free and easy outreach and marketing.
- Guided recorded tours (earphones) are described as helpful and useful to a positive museum experience.
- Include short text factoids that incorporate comparisons of exhibit themes of Idaho, to the US and to the world.
- Use existing IPTV video.
- High approval for use of Idaho’s water (both natural and man-made) as the connecting theme through the entire space. Use of real water preferred whenever possible instead of representations (media streams, audio recordings, banners, videos).
- Concern over high ceilings creating echoes and additional noise were a concern.
- Participants want to be educated and in an entertaining fashion with interactives, sensory use, apps, games.
- Live video streaming abilities for guest speakers’ presentations.
- Design audio/video experiences on wilderness and our national and state parks and forests for virtual visitors and hearing and sight impaired visitors. Accurately give credit to the impact of Bethine Church in the content of nature preservation.
- Design exhibits that show the trajectories of changes in industries through to today. Ex: have photographic representations that show the implements used for mining, or cutting down a tree from what was used 100 years ago to today. Show the changes for students learning about inventions and science.
- Contact local museums throughout Idaho to check accuracy of information and to ask for exhibit items.

Process Recommendations

- Local specialists and patrons are requesting ISHS lead a consortium or some sort to unify Idaho’s museums and collections (both public and private) in order to share resources, expertise and traveling exhibits. Increased funding applied to creating this network will result in efficiency, eventual cost savings from working together, and improved exhibits for everyone.
- 90% of participants were pleased with the confidential process used to gather their input, and 100% agreed to continue as an engaged stakeholder for vetting content, design and outreach ideas.
- Outreach will likely pay significant benefits with established supporters created. 94% said they will speak to their friends and family favorably about the Museum renovation project. 94% said they now plan to travel to Boise and visit the new Museum opening in 2017.
- There is a need for additional outreach statewide on content decisions. A third, 36%, are not sure, or disagree, that the most important topics are included in this current design. Each region demonstrates consistent doubt about the themes and stories being the best content (Boise 42%, Hailey 38%, IF 23%,

Lewiston 41%, McCall 38%, CdA 35%, Pocatello 33%, TF 27%), and have given hundreds of suggestions (located in the appendix to this final report).

- Create a list of volunteer guest speakers, teachers and specialists from around Idaho who will speak but also those who will demonstrate music, art, dancing, cooking, knitting, carving, whatever their specialty might be.
- Designated days for guest speakers and demonstrations, ie Monday evenings, or Saturday mornings.

Summary

Results have shown that this exercise has given data that will be beneficial to improving the content, the design and the processes used for decision making and outreach. Among the many other results, we now know where there are high and low rates of content approval, and can pinpoint in which regions additional outreach and listening is needed. We know how topics are considered statewide and separately in each area and can make decisions accordingly. We have results for preferential use of immersive experience design and technology in the Museum experience and this will help guide the design team, as well as budgeting decisions for what is effective. We know that respondents want the Museum to show similarities among the peoples and regions of the state, and not create or emphasize possible geographic differences. We now know for our content decisions that –statewide– people are most interested in exhibits that tie Idaho’s Native Peoples to the subject matter, and for special events, that well known guest speakers are a top motivating factor for attendance. We know that the treatment of controversial subject matter is necessary and approved, and we have the suggested guidance from the people who have personally lived through the events or live in the area of the events.

The ongoing positive effect of this statewide effort has already multiplied as evidenced by communications from state legislators, k-university educators, business and cultural associations. The positive response to the Director and team traveling to meet local community activists and stakeholders cannot be overemphasized.

Thank you for this opportunity to collaborate with this team of committed professionals. Respectfully submitted,

Gloria Totoricagüena
Idaho Policy and Consulting

**ISHS Museum Renovation Focus Groups Research
Educators Survey Summary Findings
Dr. Gloria Totoricagüena
February 21, 2016**

The following report summarizes the main data trends for the Educators' full-day workshop of survey and discussions, followed by the actual questions and the summaries of rankings of main theme stories, ratings for general topics, and data for each question. The full Survey Monkey data results are included in the Appendix. Once the focus group exercise began, 100% of participants stayed for the full day of activities and individually answered the confidential and anonymous electronic survey. During the day, most participants also gave oral input aloud, approximately 95% of that input being positive regarding what they were seeing and learning about the ISHS, and the 5% being comments that they never knew so much available material existed and they were disappointed in themselves, and in the lack of outreach. Overall, results point to the Museum content and design choices being right on target for educational objectives, and where there are weaker points of interest, the data are clear on which exhibits and which themes might need improvement.

Main Findings

Educators are a Wealth of Ideas, Information and Enthusiasm for the Museum

Open-ended questions allowed teachers to give ideas for how they would use exhibit stories in their grade and discipline educational objectives. Participants created over 700 separate ideas/responses for using exhibits with 21st Century skills, Common Core and Idaho State Standards giving K-12 content and skills examples covering each grade level and all disciplines. The Appendix responses must be read in order to fully appreciate the depth and breadth of educational opportunities seen by the participants. Teachers' desire to remain engaged with the Museum renovation content, design and educational programming was 100% favorable. Now that the participants know what is and will likely be available, 100% responded that they will use ISHS resources to enhance their future students' learning experiences.

Educators' responses showed consistency across disciplines and grade levels

The response data demonstrate that large majorities- regardless of grade level or discipline taught- want and expect similar experiences for their Museum visit and for their use of ISHS resources. These clear expectations give clear direction to ISHS decision making for educational programming and budgeting:

- 100% want downloadable photos, maps and documents for students use and lesson planning;
- 96% expect students to have a full experience of both intellectual and emotional learning;
- 95% want downloadable curated videos on Idaho topics for classroom use;
- 95% expect access to a curated list of links to further information on Idaho topics;
- 92% expect students will see authentic/exotic artifacts;
- 91% want access to a "Teachers' Corner" with ready-made lesson plans connected to state standards;
- 88% expect students to have an emotional experience or connection to a person or event they would not have had otherwise;
- 88% expect the exhibits to improve students' understanding of human behavior today;
- 83% want students to access artifacts, uniforms, jewelry and costumes of famous Idahoans;
- 82% want access to ISHS data sets on Idaho topics;

77% want ISHS apps with educational games on the ISHS website.

Approval for the Main Themes and Designs chosen thus far

Participants found educational value in all ten main themes in the upper level, and more than a majority responded that they will use the Museum and ISHS resources with eight of those themes to plan for their lessons and student experiences. "Wilderness" and "Water" themes ranked the highest. The two low ranking exhibits in educators' oral questions, discussions and the survey results are consistently "Recreation" and "Refuge." (See Question #22.) The other eight main themes would be used by all grade levels and all disciplines taught by the participants.

Q. 40, Q.41, Q.42 response data also demonstrate that teachers approve of the lower level content and process educational objectives and will "definitely use" or "likely use" the following exhibits:

History Lab:

- 68% Digging for Answers anthropology/archaeology unit
- 68% You are Here and map activities
- 55% Mabel's Photo Mix-up
- 50% Down on Grandpa's Farm and agriculture
- 41% A New Old House and architecture

Creative Play:

- 73% Mining Area
- 73% Railroad Area
- 59% Theater Area and Stage
- 45% Penny Arcade
- 45% Builder's Office

What's Your Story:

- 82% More than 30 stories of Idahoans and the interconnectedness of the human experience.
- 82% Digital Tapestry: visitor adds their own history and characteristics to the Idaho database.

In general, participants will use the following :

- 100% will use interactive exhibits to engage students.
- 95% will use website pre-visit and/or follow-up activities available for student enrichment.
- 91% will use pre-visit communications and planning with Museum staff.
- 86% will access the ready-made pre-visit or follow-up lesson plans.

Outreach and Engagement

- 100% of these educators agreed that they want and need ISHS to increase and improve its outreach to the education community. They want to engage with ISHS staff and resources.
- 95% want to participate in professional development in-service workshops, "Teacher's Night" types of events and giving input for ISHS educational programming.
- 82% want the ISHS to collaborate with Idaho's universities' Colleges of Education to establish credit granting courses for teachers to create grade and discipline appropriate programming for the Museum.
- 81% want ISHS to act as a catalyst to enhance the learning systems across the state of Idaho.

Educators' response data for their "Go to" resources for information about Idaho indicate that ISHS resources are used by less than half of the participants:

48% use Idaho State Historical Museum (ISHS);
44% use Idaho State Archives (ISHS);
17% use Idaho State Historic Preservation Office (ISHS).

As above, approximately half of the participants are not currently using ISHS resources, and 30% responded "I did not know that ISHS has educational materials that would apply to my subject/grade level." 17% responded, "I do not typically use Idaho examples in my curriculum." This could likely be changed with increased outreach to teachers.

The most efficient and effective means for ISHS to network with teachers and classrooms around the state are through group email and live Webinars. Most effective means for faculty outreach include ISHS staff personal visits and participation in district or building meetings, and ISHS email newsletters with educational ideas, events calendars and information. Additionally, teachers requested:

- Social media reminders to teachers through facebook posts, emails, Tumblr, Pinterest, Google Hangout, etc. with a yearlong calendar regarding new exhibits, special events, speakers, etc.,
- Workshops and in-service for teachers,
- Coalition for all Idaho Museums, and one website for centralized teacher ideas by grade/discipline,
- Much more outreach to the education community,
- "Teachers Night" free entrance with professional development programs for educators.

Using Technology

Repeated discussion and free-writing comments strongly recommend to the ISHS:

- We do not go to the Museum to use or do anything that we could do online from the classroom. We want to examine the real artifacts.
- Tangible physicality is more important than high tech representations; touching and seeing original artifacts is an expectation.
- Don't buy devices, as people almost always have their own and in the future most likely always will have their own.
- Expertly vetted QR codes and links to additional information are essential.

95% think it important for visitors to be able to engage with interactives designed for specific exhibits.

87% think the Museum's micro-experiences are important for the students' successful learning of the topic/process addressed.

86% think it important to access additional data sets, digitized photos and additional information about the collections, including costumes and textiles.

The following pages give the survey questions and the data results. In select free-writing options, there are patterns of similar answers that are given and those are reported herein. In other cases, the free-writing responses are so different from each other that there are no definite categories or trends. My recommendation there is to read through the individual responses in the Appendix.

**IDAHO EDUCATORS SURVEY
DATA SUMMARIES**

Q1. Please select the one statement that most closely represents your reaction to the Museum's opening space.

84% like the opening Origins as is

12% feel it overwhelming, but think the students will like it

4% prefer fewer media experiences and prefer something be removed

Other suggestions to include or exclude, please see appendix. Repeated comments include

- like the hands-on ability for interactives
- want indigenous artwork
- want physical artifacts of geology that people can hold and touch
- want a Map of Museum itself will be necessary to orient the visitor to know what is available and how much time to spend in each section.
- Want active engagement, not passively reading text, is critical to learning.

Q2. Lumbering stories ranked:

Most interesting/useful for educational objectives

- Big Burn...
- Difficulty of Idaho landscape, ways lumbermen adapted
- Economic significance of lumbering to Idaho
- What it was like to work in the woods and lumber camps
- Development of US Forest Service

Least interesting/useful

- Connections between lumbering and mining
- Stump farming
- Pineros

Q3. Anchor concepts for lumbering. Multivariate answers, please see appendix.

Q4. Mining stories ranked:

Most interesting/useful for educational objectives

- Environmental impacts of mining
- Underground mines, unions
- Clearwater miners trespassing and Nez Perce

Least interesting/useful:

- Discovery of gold in CdA in 1880s

Q5. Anchor concepts for mining. Multivariate answers, please see appendix.

Q6. Transportation storied ranked:

Most interesting/useful for educational objectives

1. Difficulty of north-south travel in Idaho past and present
2. Three transcontinental railroads
3. Innovative transportation methods

Least interesting/useful

- Mullan Road to I90

Q7. Anchor concepts Transportation. Multivariate answers, please see appendix.

Q8. Refuge stories ranked:

This theme had several participants not rank a single story as interesting or useful. Oral comments included that the participant knew they would not use any of these stories, and if visiting would simply not direct students toward this section when there are so many other more interesting exhibits.

Most interesting/useful for educational objectives

1. Farragut Naval Training Center
2. North Idaho lakes and rivers
3. Aryan Nations and ultra conservatives

Least interesting/useful

- Nell Shipman

Q9. In which disciplines would you use the Lonesome Larry exhibit?

72% would use in Social Studies or in Sciences.

56% would use in Language Arts

52% would use in Art, Music, Drama

28% would use in Math

12% would not use the exhibit at all.

Q10. Anchor concepts for Endangered Species. Multivariate answers, please see appendix.

Q11. Recreation stories ranked:

This theme had several participants not rank a single story. Oral comments were that this might not warrant an entire section of a Museum, could be replaced with an entire section on women, could be replaced with an entire section on Idaho writers and artists.

Most interesting/useful for educational objectives

1. Tie for #1 story
 - Development of state parks system
 - River Recreation, River of No Return
2. Development of Sun Valley

Least interesting/useful:

- Summer and winter lodges
- Backcountry airstrips
- Hot springs

Q12. Anchor concepts for Recreation. Multivariate answers, please see appendix.

Q13. Wilderness stories ranked:

Most interesting/useful for educational objectives

1. Role of Senator and Bethine Church
2. Idaho as a significant center in debates over primitive areas and wilderness areas

3. Sawtooths as a case study in wilderness areas

Least interesting/useful

- Debate over White Cloud Mountains
- Role of Idaho Federation of Women's Clubs

Q14. Wilderness anchor concepts. Multivariate answers, please see appendix.

Q15. Southern Idaho before irrigation stories ranked:

Most interesting/useful for educational objectives

1. Oregon Trail
2. Indian-settler confrontations on Oregon Trail
3. Environmental consequences of removing beaver

Least interesting/useful:

- "fur desert" and Andrew Henry
- Astorian expedition and fur trapping

Q16. Southern Idaho after irrigation stories ranked:

Most interesting/useful for educational objectives

1. Early efforts, Mormon cooperatives
2. Arrowrock as tallest dam, irrigation brought to Boise valley.
3. Milner and Shoshone Falls

Least interesting/useful:

- Pump irrigation, Snake River Aquifer
- Great Feeder
- Snake River Basin Adjudication

Q17. Anchor concepts for irrigation. Multivariate answers, please see appendix.

Q18. Agriculture stories ranked:

Most interesting/useful for educational objectives

1. Japanese residents on Minidoka internment camp
2. Ranching grazing, grazing conflicts
3. Basques
4. Ag bounty and dairy in the south

Least interesting/useful

- JR Simplot, potatoes, potato yields and phosphate
- Mexican braceros

Q19. Agriculture anchor concepts. Multivariate answers, please see appendix.

This is one of the few free-write response "anchor concepts" question where a high majority of respondents specifically mentioned including ethnic group diversity in the exhibits and how they need those diversity stories for their content and process skills.

Q20. Urbanization stories ranked:

Most interesting/useful for educational objectives

1. Boise
2. Businesses of southern Idaho

3. Idaho Falls and INL
Least interesting/useful
- Twin Falls as a planned city
 - LDS influence in Idaho

Q21. Urbanization anchor concepts. Multivariate answers, please see appendix.

Q22. Likelihood of using the different exhibits for lesson planning.

The following percentages combine the responses for “Definitely will use” and “Likely will use”

- 91% Wilderness Areas
- 83% Water Resources
- 78% Forestry
- 74% Agriculture
- 70% Endangered Species
- 70% Mining
- 70% Urbanization
- 61% Transportation
- 45% Recreation
- 39% Refuge

**Q23. How could we best utilize resources for the online applications of Museum area themes?
Multivariate responses, please see appendix.**

Repeated ideas for various subjects and grades include

- Virtual tours
- 3D digital files of artifacts for 3D printers at their home school

Q24. Multi-modal learning and accommodations for I.E.P.s.

Participants’ suggestions are multivariate. Repeated answers include:

- Hands on learning, allow touch, include manipulatives in each area and each exhibit
- have head sets with audio input;
- key words access in addition to existing longer texts;
- teacher training needed
- Spanish language text
- Many photos and videos on devices for additional examples

Q25. How can exhibits be best designed for visitors to practice 21st Century Skills?

Participants’ suggestions are multivariate. Repeated answers include:

- Post thought-provoking questions within each exhibit
- Create essential questions that encourage multi-disciplinary and multi-level creative thinking.
- Visitor guide/map should include questions for each section
- Questionnaire or quiz at the end of the visitor’s tour

Q26. Factors motivating teachers to include a Museum visit when budgeting for teaching time and funding.

- 96% I expect students to have a full experience of both intellectual and emotional learning.
- 92% I expect students will see authentic/exotic artifacts.
- 88% I expect students to have an emotional connection or experience to a person or event they would not have had otherwise.
- 88% I expect the exhibits to improve students' understanding of human behavior today.
- 68% I expect student exposure to role models and inspiring people.
- 64% I expect students to be exposed to the aesthetic beauty of original artifacts.
- 54% I expect a relaxed and informal experience for the students
- 40% I expect students to be amused and entertained.

Q27. Top motivating factors to organize a student visit to any Idaho history museum.

An oral discussion included the clarification that a low ranking did not equate to not being interested in that factor, but that perhaps students could see or do that online. The desire is to go to the Museum to have an experience that the teacher cannot recreate anywhere else.

The top motivating factors are:

1. Free or low cost
2. Technology enhanced experiences
3. Well-known expert guest speaker
4. Native peoples artifacts
5. Scientific demonstration
6. Movie, art or music experience
7. Natural resource related exhibit

Q28. How should the Museum treat controversial subjects?

Combining the "Strongly Agree" and "Agree" responses:

- 96% I want my students to see media reports of the day to see what was being reported as fact during that time period.
- 92% The sayings, writings, photographs of the actual people/institutions involved should be used to help students empathize with different sides of the issue.
- 88% The various opposing views of professional social scientists' analyses should be presented as descriptions and explanations for what happened.
- 88% Controversial issues in Idaho should be linked to similar events around the nation and the world to show students that these are human behavior issues, and not unique to Idaho.
- 71% Controversial events and experiences must be addressed with supporting weblinks to downloadable material for additional information. It is impossible to address these properly in a small space and short time.
- 33% Controversial topics should not be addressed unless they have clear educational objectives for all visitors.
- 33% The content of the actual controversy is not as important as how the community managed the conflict and what the outcome is so far in history.
- 8% Controversial topics should not be addressed in the exhibits unless they have changed the history of the entire region.

Q29. Educators' "Go to" resources for information about Idaho:

These data indicate that ISHS resources are used by less than half of the participants:

74% General Google search.
70% Idaho state or local newspapers, radio and television and their websites.
52% Books and journals publications.
48% Idaho State Historical Museum (ISHS).
43% University professors, university libraries and/or university websites.
44% Idaho State Archives (ISHS).
35% Idaho governmental departments' and agencies' websites.
17% Idaho State Historic Preservation Office (ISHS).
9% General Wikipedia search

17% I do not typically use Idaho examples in my curriculum.

Q30. Educators' other resources for information about Idaho are quite varied, but repeated responses refer to specific websites, PBS, Youtube, and community members. See Appendix.

Q31. Top 5 issues (in order by the number of times mentioned) that every Idaho graduating senior should know:

- Geography of Idaho
- Cultural groups and demographic representations in Idaho
- Politics and government: Idaho's system, ideologies, issues past and present
- Main industries and businesses past and present
- Lewis and Clark and the Oregon Trail

Q32. Treasures of Idaho ratings for meeting the teacher's educational objectives.

Results of combining responses for "Very Important" and "Important":

83% I want my students to access artifacts, uniforms, jewelry and costumes of famous Idahoans.
74% I want my students to draw connections between changing social and cultural norms and fashion.
65% I want my students to appreciate the beauty of handmade textiles.
65% I want my students to access the artisanship of handmade textiles.
55% I want my students to see how technology has influenced self-representation through fashion.
52% I want my students to learn about aesthetics in its many forms.

Q33. Mabel's Photo Mix-up exhibit ratings:

86% It is entertaining, interesting and relevant to my curriculum objectives.
77% It teaches Idaho standards for content and 21st Century skills.
18% For various reasons, I would not use it with my students.

To enhance the value of this exhibit to meet my grade and/or discipline area I would suggest the following changes/activities:

Please see appendix. Several suggestions are given for what the photos should include, i.e. Mabel is in the military/veteran and photos show her in France, Germany, Korea, Vietnam, Nicaragua, Afghanistan.

Other repeated suggestions include:

- incorporating technology and having the photos be digital rather than on a magnetic board;
- audio included with period music;
- teaching about primary source materials.

Q34. You are Here mapping exhibit ratings for educational objectives:

67% It is entertaining, interesting and relevant to my curriculum objectives.

71% It teaches Idaho standards for content and 21st Century skills.

33% For various reasons, I would not use it with my students.

To enhance the value of this exhibit to meet my grade and/or discipline area I would suggest the following changes/activities. Please see appendix. A few repeated responses:

- Tribal homelands vs reservation lands;
- public lands/private property;
- cities/counties/regions;
- geographical/topographical features;
- ecosystems and habitats;
- river systems and water shed;
- populations density;
- ethnic and cultural groups;
- place names and their origins, ie. Civil War place names in Idaho;
- mining towns/lumber towns/rural and urban distinctions

Q35. A New Old House ratings for educational objectives:

67% It is entertaining, interesting and relevant to my curriculum objectives.

62% It teaches Idaho standards for content and 21st Century skills.

29% For various reasons, I would not use it with my students.

To enhance the value of this exhibit to meet my grade and/or discipline area I would suggest the following changes/activities. Please see appendix. A few repeated responses:

- Include building a school, office, airport, bridge, dam, football stadium etc.
- Use Lego labs
- Incorporate STEM throughout this information
- Incorporate a CAD program with software that has different levels

Q36. Down on Grandpa's Farm exhibit ratings for educational objectives:

55% It is entertaining, interesting and relevant to my curriculum objectives.

50% It teaches Idaho standards for content and 21st Century skills.

45% For various reasons, I would not use it with my students.

To enhance the value of this exhibit to meet my grade and/or discipline area I would suggest the following changes/activities. Multivariate suggestions/answers, please see appendix.

Q37. Digging for Answers anthropology/archaeology exhibit ratings for educational objectives:

75% It is entertaining, interesting and relevant to my curriculum objectives.

70% It teaches Idaho standards for content and 21st Century skills.

25% For various reasons, I would not use it with my students.

To enhance the value of this exhibit to meet my grade and/or discipline area I would suggest the following changes/activities. Multivariate suggestions/answers, please see appendix.

Q38. Creative Play: In order for K-5 learners to be able to practice and demonstrate age appropriate scientific and mathematical literacy etc., what design concepts could be added to this exhibit?

Multivariate suggestions/answers, please see appendix.

Q39. What core elements can we incorporate into the “What’s Your Story” design that will tie this content to your Idaho standards content and 21st century skills?

Multivariate suggestions/answers, please see appendix.

Repeated suggestions include:

- Need to have many revolving stories so that visitors will return, need to change the stories often
- Change to digital representations
- Change the stories to the experience instead of the person, ie “Fear” and have several famous people’s fear experience, “Love” and have several different people’s love experience, “perseverance” and have several different people’s perseverance experience.

Q40. History Lab: Thinking of your year’s curriculum, rate each activity and your likelihood of using it for your educational objectives (adding response rates for “Definitely will use” and “Probably will use”).

68% Digging for Answers anthropology/archaeology unit

68% You are Here and map activities

55% Mabel’s Photo Mix-up

50% Down on Grandpa’s Farm and agriculture

41% A New Old House and architecture

Q41. Creative Play: Thinking of your year’s curriculum, rate each activity and your likelihood of using it for your educational objectives (adding response rates for “Definitely will use” and “Probably will use”).

73% Mining Area

73% Railroad Area

59% Theater Area and Stage

45% Penny Arcade

45% Builder’s Office

Q42. What’s Your Story: Thinking of your year’s curriculum, rate each activity and your likelihood of using it for your educational objectives (adding response rates for “Definitely will use” and “Probably will use”).

82% More than 30 stories of Idahoans and the interconnectedness of the human experience.

82% Digital Tapestry: visitor adds their own history and characteristics to the Idaho database.

Q43. Please rank the top 5 of the following skills in order of importance for your expectations for your students’ Museum visit. In order of teacher ranking as most important:

1. Thinking creatively and innovatively about the past and its effects on the present.
2. Making judgements and decisions regarding changing and alternative points of view.

3. Using technology as a tool to research, organize, evaluate, and communicate information.
4. Demonstrating the capacity to pose and evaluate scientific arguments based on evidence.
5. Accessing information supplemental to that provided in wall text copy (QR codes, links, etc.).
6. Collaborating with others, demonstrating flexibility and ability to create compromise.
7. Working creatively with others.
8. Understanding and utilizing the most appropriate media creation tools, characteristics, and conventions.

Q44. How important do you think the following skills are to include in the Museum’s educational programming? Results after combining “Very Important” and “Important” responses:

- 95% Working independently and in a self-directed manner
- 86% Guiding and leading others, interpersonal and problem-solving skills
- 86% Flexibility and ability to adapt to change
- 82% Interacting effectively with others
- 68% Being accountable to others and the larger community
- 67% Planning and managing projects for time and product output
- 59% Working effectively in diverse teams (mixing ages, disciplines, schools)

Q45. What specific things can be included in the overall Museum design to ensure the selected exhibits teach process concepts (collaboration, leadership, compromise, project management, etc.) and not only the content?

Multivariate suggestions/answers, please see appendix.

Q46. How likely are you to access these possible future ISHS digital materials?

Responses after summing “Definitely will use” and “Likely will use”:

- 100% Download photos, maps and documents for students use and use in my own lesson planning.
- 95% Download curated videos on Idaho topics for classroom use.
- 95% Access a curated list of links to further information on Idaho topics.
- 91% Access a “Teachers’ Corner” with ready-made lesson plans connected to state standards.
- 82% Access to ISHS data sets on Idaho topics.
- 77% ISHS apps with educational games on the ISHS website.
- 73% Live streaming for live interactivity with ISHS staff or guest speakers during the school day.

Q47. The Museum’s immersive experiences are definitely worth the extra cost for educational objectives and, if necessary, the removal of other smaller parts of the exhibits.

73% Combined responses for “Strongly Agree” and “Agree”

Q48. How effective do you think the micro-experiences are for the students’ successful learning of the topic/process addressed?

87% Combined responses for “Very effective” and “Effective”

Q49. While at the Museum, how important is it to the Museum experience that your students be able to use a device to do the following:

Combined responses for “Very Important” and “Important”:

95% Engage with interactives designed for specific exhibits.

86% Access data sets, digitized photos and additional information about the collections, including costumes and textiles.

77% View/listen to a more detailed curated video/audio tour of exhibits within the Museum.

64% Contribute their own oral history to the Museum's website.

50% Watch videos designed for the Museum galleries.

Other suggestions for using technology while at the Museum. Please see appendix for teachers' individual answers. Repeated answers include:

- We do not go to the Museum to use or do anything that we could do online from the classroom. We want to examine the real artifacts.
- Tangible physicality is more important, touching and seeing original artifacts.
- Don't buy devices as people almost all have their own.
- QR codes and links to additional information

Q50. Which would be the most efficient and effective means for ISHS to network with you and to connect you to another teacher/classroom in another area of the state?

In order of teachers' ranking of most efficient and effective for networking:

1. Group email
2. Live Webinars
3. GoToMeeting
4. Skype
5. Idaho Education Network
6. Teleconference

Q51. In your experience, please rank the most effective way for us to conduct faculty outreach across Idaho.

In order of teachers' rankings for most effective for outreach:

1. ISHS staff personal visits and participation in my district or building meetings.
2. ISHS email newsletters with educational ideas, events calendars and information.
3. Recorded webinars that I can watch at my own convenience.
4. Short 10-15 minute live webinars for teachers during lunch break or after class hours.
5. Teleconferencing.

Q52. What other strategies do you think would be effective at increasing ISHS' engagement with k-12 teachers across Idaho?

Please see appendix for teachers' individual answers. Repeated answers include:

- Social media reminders to teachers through facebook posts, emails, Tumblr, Pinterest, Google Hangout, etc. with yearlong calendar and about new exhibits, special events, speakers etc.
- Workshops and in-service for teachers
- Coalition for all Idaho Museums, and one website for centralized teacher ideas by grade/discipline.
- Need much more outreach to education community
- "Teachers Night" free entrance and professional development programs for educators

Q53. Please rate each of the following motivating factors influencing you to engage consistently with educational programming at ISHS. Rate each possibility from High to None.

Results combining the responses for "High" and "Moderate":

- 90% Opportunities to collaborate with others from throughout Idaho.
- 90% Earned university credits for my time and expertise.
- 90% Professional development workshops with other teachers in my grade/discipline.
- 90% Personal access to available artifacts and Museum collections and databases.
- 86% Personal access to content experts and guest speakers.
- 86% A free annual membership.
- 76% Participating on committees with people from business, politics, non-profit organizations and others not in the formal education professions.

Q54. Please rate each of the following factors for a successful visit to the Museum and meeting your learning objectives.

Combining results of "Very Important" and "Important"

- 100% Interactive exhibits to engage my students.
- 95% Website pre-visit and/or follow-up activities available for student enrichment.
- 91% Pre-visit communications and planning with Museum staff.
- 86% Access to ready-made pre-visit or follow-up lesson plans for me to use.
- 59% Having a staff tour guide for my students while at the Museum.

Q55. Please rate the importance of the following to your use of ISHS resources:

Combining results of "Very Important" and "Important"

- 82% A free "pre-visit" for teachers/chaperones before visiting with my students.
- 73% Digital relationship with ISHS staff through blog, web activity or email exchanges.
- 64% Having an ISHS staff person come to my classroom as a part of a pre or post visit to the Museum.
- 64% Personal relationship with someone at ISHS to guide me.
- 50% Pairing with other teachers in my building from other disciplines or grades to collaborate on interdisciplinary learning objectives.

Q56. Currently, how often do you use any ISHS resources with your students or for lesson planning?

- 43% 1-3 times each year.
- 33% I have never used any ISHS resources.
- 19% 4-6 times each year.
- 5% More than 10 times each year.
- 0% 7-10 times each year.

Q57. Describe your experience with using ISHS resources for your teaching.

- 30% I did not know that ISHS has educational materials that would apply to my subject/grade level.
- 25% I have never looked at the available materials to determine if they are useful to me or not.

- 30% Useful materials/ideas were easy to find.
- 25% Useful materials were found but with difficulty.
- 5% I have checked the available materials and did not find any useful to my discipline/subject.
- 5% I have checked the available materials and did not find any useful for my grade level.

Q58. I expect the new Museum's objectives and strategic planning to include:

Combining responses for "Very Important" and "Important":

- 100% Engaging with the public schools, private schools and home schooling.
- 95% Conducting professional development workshops for how teachers can best use the ISHS collections.
- 82% Collaborating with Idaho's universities' Colleges of Education to establish credit-granting courses for teachers to create grade and discipline appropriate programming.
- 82% Leveraging collections and content expertise to engage diverse audiences across Idaho with educational outcomes in mind.
- 81% Acting as a catalyst to enhance the learning systems across the state of Idaho.
- 77% Providing flexible, co-created, immersive experiences that connect students across the state.
- 68% Implementing a planned "architecture of participation" that enables collaborative projects among Idaho's schools, teachers and students.
- 50% Collaborating with Idaho's business community to incorporate employable skills in exhibits programming.
- 32% Facilitating meetings with young parents, designed to encourage early childhood learning.

END of survey.

**ISHS Museum Renovation
Focus Group Methodology
Dr. Gloria Totoricagüena
February 22, 2016**

Data collection for opinions, beliefs and attitudes can be achieved by using quantitative methods and questioning as well as by using qualitative methods, questioning and activities. Both quantitative and qualitative data collection were combined for this ISHS project of determining participants' preferences, attitudes, behaviors, and expectations for the Museum renovation and subsequent programming.

Focus group exercises are a data collection method which can follow a semi-structured or strictly structured protocol. The ISHS research objectives necessitated using a strictly structured protocol, following a thoughtfully planned and timed chronological order, and we also incorporated non-structured questions which allowed participants free-writing and expression of their innovative thinking for the Museum renovation. The protocol included:

- 1.) ISHS Director's audio/visual presentation, descriptions and explanations of the proposed new exhibits and stories,
- 2.) discussion and questioning for clarification allowed during those audio/visual presentations,
- 3.) a confidential and anonymous electronic survey previously loaded in Survey Monkey and live on each participant's desktop when they arrived to the exercise,
- 4.) third party (not an ISHS stakeholder) neutral moderator led the section-by-section presentation slides matched to each survey question, and answered clarification questions without leading the participants to favor or dislike any content or design topics,
- 5.) participant ability to give their confidential input without ISHS or any other participants knowing their preferences, and also giving free-writing answers,
- 6.) after completion of the electronic survey exercise, a final discussion with the Director of ISHS allowed for group discussion and for participants to give their comments in public.

By creating a survey tool with closed option questions (ranking interesting/impactful stories, rating the importance or likelihood of use for educational objectives, giving preferences for technology enhanced experiences, etc.), ISHS could ask for the exact information it needed for the named content and design decisions. By adding the open-ended free-writing questions, we gathered data from a much larger universe of possible answers- the participants' imaginations and creative thinking (feel of the spaces, exhibit titles, uses for technology, uses for educational objectives, etc.).

The combination of both types of questions was necessary to gather the needed types and details of information. The confidentiality was necessary to ensure participants were not swayed by other participants' comments or interests. The individualized survey was necessary to ensure we gathered the same data from each participant and each participant had the opportunity to give their input on every

single question. This combined approach of conducting the moderator-led simultaneous group presentation and individual surveying was the most effective and efficient means to reach larger audiences, present the controlled and same information to the participants, eliminate misunderstandings regarding the content and design they were seeing by being present to answer questions, and to utilize the free technology of Survey Monkey to collect the survey digital responses instantly. This method saved time, saved money, increased the number of participants we could survey and gave reliable statistical quantitative data as well as written individualized qualitative data.

Between July and November 2015, the Director and staff of the ISHS and consultant Dr. Gloria Totoricagüena conducted nine separate focus group exercises in Coeur d'Alene, Lewiston, McCall, Boise, Hailey (two different groups on the same day), Twin Falls, Pocatello and Idaho Falls. These exercises were generally 2.5 hours in time length.

The 2015 analyses of the quantitative and qualitative data is organized in to a statewide database by combining the questions that were asked of everyone in each region, and also has separated out the region-specific content and ranking questions for geographic comparative information. The appendix data charts show statewide results first, followed by each region's results for comparisons. This was necessary and useful to look for discrepancies amongst the regions and for accurate focused recommendations of where and on which topics additional work could benefit the ISHS program. The region-specific content ranking and open writing answers will assist the decision making for content, design, process and also for cost budgeting.

The nine regional group data are analyzed into three categories where it can give guidance for continued consideration by ISHS and the design team: 1.) content of the exhibits, 2.) design of the exhibits and overall interior, and 3.) the process for continued outreach and public relations for ISHS. The summaries of the repeated written and discussed ideas, concerns and suggestions are found in the file "ISHS Museum Renovation: Statewide Focus Groups Outreach, Research Results and Report of Findings." This is 8 pages of summarized data from the nine regional exercises. The detailed quantitative answers (85 pages) and the qualitative free-writing open-ended question responses (89 pages) are available in the appendix of the 2015 report and from the ISHS offices.

On February 5, 2016, ISHS conducted an all-day focus group exercise with educators K-12 and from all disciplines, from the Treasure Valley. This educators' exercise lasted 6.5 hours. All activities, discussion and survey questions were related to the Museum renovation's educational content and process standards for Idaho. The resulting quantitative and qualitative data is rich with serious consideration by professional educator participants. Free-writing open-ended questions resulted in several hundred ideas, suggestions and comments that will be useful for years to come. The Main Findings report is 17 pages with the quantitative data results aggregated. The qualitative free-writing answers are listed with each question and are in the file "Teachers_Summary_Data", which includes 104 pages of survey answers.



**American
Alliance of
Museums**

Museums: Did You Know?

Arts and cultural production constitute
a \$698 billion industry,
4.32% of the entire
US economy

more than construction (\$586.7 billion) or
transportation and warehousing
(\$464 billion).

*U.S. Department of Commerce Bureau of Economic Analysis, Arts
and Cultural Production Satellite Account*



Museums spend
more than
\$2 Billion
a year on education
activities.

*American Alliance of Museums 'Museum
Financial Information Survey' (2009)*



Museums sustain more than
400,000 Jobs
and directly contribute
\$21 Billion
to the US economy each year.

AAM Financial Information Survey

**26% of museums
are located
in rural areas;**

others serve these communities with traveling
vans, portable exhibits and online resources.

*Institute of Museum and Library Services 'Museum Universe
Data File' (2014)*

Museums are for everyone, regardless of income level.

**37% of museums
are free
at all times**

or have suggested admission fees only;
nearly all the rest offer discounts or free admission days.

*American Alliance of Museums 'Annual Condition of Museums and the
Economy' study (2013)*

There are approximately

850 million visits

each year to American museums, more
than all major league sporting events
and theme parks combined.



Learn more about museums' impact at: aam-us.org/about-museums/museum-facts



American Alliance of Museums

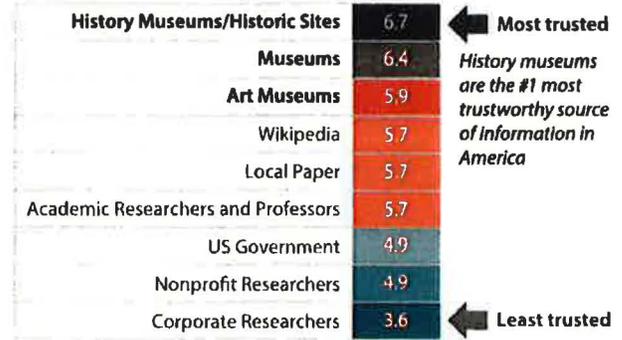
Museums: Did You Know?

Museums preserve and protect more than

1 billion objects.

Heritage Health Index (2004)

Most Trustworthy



Scale: 0 = not at all trustworthy; 10 = completely trustworthy

Reach Advisors | Museums R+D

Students who attend a field trip to an art museum demonstrate improved **critical thinking skills, historical empathy and tolerance.**



Education Next 'The Educational Value of Field Trips' (2014)

Museum volunteers contribute

1 Million Hours

of service every week.



American Alliance of Museums 'Museum Financial Information Survey' (2009)

More than 2,200 museums participate in the Blue Star Museums initiative, offering free summer admission to all active-duty and reserve personnel and their families. This effort serves over 700,000 people.



National Endowment for the Arts

The nonprofit arts and culture industry annually generates

\$22 billion

in local, state and federal tax revenues, far more than it receives from government sources.

Americans for the Arts 'Arts and Economic Prosperity IV' (2012)

Learn more about museums' impact at: aam-us.org/about-museums/museum-facts

HISTORY RELEVANCE CAMPAIGN

THE VALUE OF HISTORY

SEVEN WAYS IT IS **ESSENTIAL** »

TO OURSELVES

- **IDENTITY** » History nurtures personal identity in an intercultural world. History enables people to discover their own place in the stories of their families, communities, and nation. They learn the stories of the many individuals and groups that have come before them and shaped the world in which they live. There are stories of freedom and equality, injustice and struggle, loss and achievement, and courage and triumph. Through these varied stories, they create systems of personal values that guide their approach to life and relationships with others.
- **CRITICAL SKILLS** » History teaches critical 21st century skills and independent thinking. The practice of history teaches research, judgment of the accuracy and reliability of sources, validation of facts, awareness of multiple perspectives and biases, analysis of conflicting evidence, sequencing to discern causes, synthesis to present a coherent interpretation, clear and persuasive written and oral communication, and other skills that have been identified as critical to a successful and productive life in the 21st century.

TO OUR COMMUNITIES

- **VITAL PLACES TO LIVE AND WORK** » History lays the groundwork for strong, resilient communities. No place really becomes a community until it is wrapped in human memory: family stories, tribal traditions, civic commemorations. No place is a community until it has awareness of its history. Our connections and commitment to one another are strengthened when we share stories and experiences.

- **ECONOMIC DEVELOPMENT** » History is a catalyst for economic growth. People are drawn to communities that have preserved a strong sense of historical identity and character. Cultural heritage is a demonstrated economic asset and an essential component of any vibrant local economy, providing an infrastructure that attracts talent and enhances business development.

TO OUR FUTURE

- **ENGAGED CITIZENS** » History helps people craft better solutions. At the heart of democracy is the practice of individuals coming together to express views and take action. By bringing history into discussions about contemporary issues, we can better understand the origins of and multiple perspectives on the challenges facing our communities and nation. This can clarify misperceptions, reveal complexities, temper volatile viewpoints, open people to new possibilities, and lead to more effective solutions for today's challenges.
- **LEADERSHIP** » History inspires local and global leaders. History provides leaders with inspiration and role models for meeting the complex challenges that face our communities, nation, and the world. It may be a parent, grandparent or distant ancestor, a local or national hero, or someone famous or someone little known. Their stories reveal how they met the challenges of their day, which can give new leaders the courage and wisdom to confront the challenges of our time.
- **LEGACY** » History, saved and preserved, is the foundation for future generations. History is crucial to preserving democracy for the future by explaining our shared past. Through the preservation of authentic, meaningful places, documents, artifacts, images, and stories, we leave a foundation upon which future Americans can build. Without the preservation of our histories, future citizens will have no grounding in what it means to be an American.

LEARN MORE » historyrelevance.com

THE VALUE OF HISTORY

WHO WE ARE

The History Relevance Campaign is a group of history professionals posing questions about what makes history relevant today. The group came together in early 2013 and has held meetings, sessions, and open forums to formulate these seven principles at the American Alliance of Museums (2013), National Council on Public History (2013 and 2014), National History Day (2013), American Association for State and Local History (2013, 2014 and 2015), Idaho Heritage

Conference (2013), American Historical Association (2014), New Jersey History and Historic Preservation Conference (2014), State Historical Administrators Meeting (2013 and 2014), and the Smithsonian Affiliates Conference (2014), and the Virginia Association of Museums (2015). We thank the many conference session attendees who provided the ideas behind and wording for the seven values. These values also find expression in a framework developed by the State Historical Administrators Meeting.

CALL TO ACTION »

We call on organizations to endorse, share, and use this statement on the value of history in contemporary life. With common agreement, commitment, and open conversation about why history is important, we believe the historical community can change the common perception that history is nice, but not essential.

Endorsing this statement in principle is an initial step. We encourage you to adapt and incorporate these ideas into projects, training materials, mission statements, websites, marketing materials, and other institutional outlets. The seven core values are not new, but we believe that their articulation with the intent to make real, measurable change across the profession and into public realms represents a fresh start for our discipline.

TO ENDORSE» historyrelevance.com

