



Strategic Plan FY 2016-2020

Mission: Idaho State Historical Society preserves and promotes Idaho's cultural heritage.

Vision: Our vision is to inspire, enrich and engage all Idahoans by leading the state in preserving, sharing, and using history and cultural resources to help frame the present and inform and shape the future.

Values

Customer Service

- *ISHS serves the historical needs of the entire state of Idaho*
- *ISHS directly supports State Agencies, 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 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/outcomes focus in program development*

Professionalism

- *ISHS is committed to making history a vital resource for the people of Idaho through traditional programming and those that serve social needs such as building K-Career skills*
- *ISHS is committed to implementing the highest professional practices possible in alignment with national state and local standards established by professional organizations including, Society of American Archivists/Council of State Archivists, American Alliance of Museums, National Historic Preservation Act, American Library Association, American Association for State and Local History, Secretary of Interior Standards for Treatment of Historic Properties, National Association of State Historic Preservation Officers, Government Accounting Principles, Governmental Accounting Standards Board, Association of Fundraising Professionals, and Society of Human Resource Management*

ISHS External Factors

The Agency operates distinct businesses that are responsible for and responsive to the mandates of state law and federal law, and as well those programs intentionally created to benefit and

provide value to core public audiences of families, education/teachers, tourists, and history researchers. This requires competency in both regulatory astuteness and market segmentation.

- The agency's SHPO operates under federal mandates that can change without regard to state/agency priorities
- Shifts of preferences in /mandates for core audiences impacts market share and program relevancy

The Agency aligns its services with identified state needs and to the extent that these change, services are adapted as necessary.

The Agency informs its work through actively engaging in an ongoing dialog with a wide range of constituents including culturally diverse communities, educational practitioners, tourism professionals, local, state, and federal agencies, tribes, and community leaders. Positive relationships in these sectors are paramount in advancing the mission of the organization.

- Changes in the needs or desires of these community partners can impact program direction

The Agency derives half of its annual financial support through non-general fund sources. Its approach to fund ongoing and project development is strategic and based on informed consideration of what is the role of government to support and how private and other alternative sources can appropriately and cost effectively be brought to bear on advancing the organization's sustainability in a fiscally responsible manner.

- Because 50% of the agency's budget is raised from non-general fund revenue, ISHS is particularly susceptible to changes in the economy, and changes in donors' perception of the economy's health
- The opportunity to realize fund development for Agency sites in rural communities are limited
- The capital campaign for the museum may be impacted by competition for numerous community projects and ability to sustain volunteer campaign leadership

The Agency's State Archives is mandated to preserve for the historical record significant written records pertaining to local, county, and state governmental operations; its State Records Center provides storage and retrieval services for State Agencies' active records of fiscal, administrative, legal, and long term value.

- In a world of rapidly changing technology, the very definition of what constitutes a "written" record fluctuates quickly, providing economic, intellectual, and capacity challenges in meeting this long-standing statutory mandate
- Changes in Records Management at the State Agency level directly impacts cost recovery funding to support the services provided by the State Records Center

Strategic Plan Goal 1

Education and Customer Service: Create value through responsive statewide mandated history services

Objective 1: Create a new state historical museum that is an essential resource for learning, economic driver, and community/civic anchor

Achieve in 2018

Task 1.1.1 Manage and Complete Design Phase of Exhibitions

FY 2017 Benchmark(s):

- Direct Design contractors to implement Design Development Phase based on \$8 million budget/quality level
- Coordinate staff and consultant work through 30/60/90/100% Design Development phases
- Attain Board approval of 60% final exhibition design in August; 100% design in November 2016
- Adjust final designs to approved budget “build” level not to exceed \$8 million
- Complete Final Exhibition Design including all artifact selection, copywriting, multi-media, graphics, and related activities

Externalities: Coordination with DFM and legislative approval of exhibition budget

Task 1.1.2 Implement Exhibition Fabrication Phase

FY 2017 Benchmark(s):

- Transition from Design Phase to Build Phase through contract amendment
- Monitor progress monthly to ensure alignment with time line and specified levels of quality
- Ensure project schedule of values payments according to procedure framework
- Coordinate fabrication schedule with building construction schedule

FY 2018 Benchmark(s):

- Transition into onsite installation in October of 2017
- Open museum in late 2017 or legislative session 2018

Externalities:

- Adherence with DOA/DOP purchasing guideline
- Attorney review and consultation
- Coordination with Foundation for Idaho History on fundraising
- Performance of consultants

Task 1.1.3 Align exhibition activities with building construction

FY 2017 Benchmark(s):

- Coordinate project construction with DPW
- Monitor and adjust exhibition activities to meeting construction needs
- Facilitate alignment between ISHS architects/DPW project management and design team to maximize efficiencies between building and exhibition design
- Ensure ADA compliance in all exhibitions and public areas

Externalities: Unforeseen construction challenges or delays

Task 1.1.4 Transition into museum operations

FY 2016 Benchmark(s):

- Initiate educational partnerships to ensure museum is essential to Idaho schools, parents, and related stakeholders

- Initiate formal Business Plan, to ensure that museum investment is maximized, appropriately staffed, and as financially self-sustaining as possible

FY 2017 Benchmark(s):

- Engage educational advisory committee and create educational program plan for museum to implement upon opening and although emphasis is placed on museum – reflects an agreed-upon educational path for the agency
- Create retail plan that will implement upon opening
- Create and implement marketing plan that begins upon groundbreaking of museum in June of 2016

Externalities: Capacity to meet business plan goals; success of marketing strategy

Task 1.1.5 Increase amount of collections, records and information accessible to the public through technology enhancements

FY 2017 Benchmark(s):

- Create and implement outreach plan, connecting the museum through technology to Idaho and beyond (to include Historic Dress digitization initiative, onsite video conference tours, and virtual access to museum exhibitions via personal device.)

FY 2018 Benchmark(s):

- Consider, fund, and implement additional outreach initiatives, as advised by Educational Advisory Council/focus group recommendations

Externalities: Technology systems capacity and funding to support initiatives

Task 1.1.6 Open new State Historical Museum, a legacy for the citizens of Idaho

FY 2018 Benchmark(s):

- Implement Comprehensive Communications Plan
- Plan, create and deliver a series of opening events for elected officials, donors, and the public
- Implement prioritized educational programming to meet educational goals of museum and our agency
- Implement revenue based programming to ensure fiscal sustainability, including visitor service/admissions, museum store, facility rental, and membership
- Create and implement 5 year temporary exhibition plan for museum

FY 2019 Benchmark(s):

- Continue implementation of museum business plan
- Evaluation of museum including business plan and education and civic engagement programming
- Evaluation of exhibitions within the museum and on-line after year of being open to public

FY 2020 Benchmark(s):

- Plan and conduct formal economic impact study in partnership with Boise State University and Partners in the Park

Externalities: Market demand, ongoing community engagement, achieving educational impact, and success of communications plan

Task 1.1.7 Achieve Museum reaccreditation by the American Alliance of Museums in 2017

FY 2017 Benchmark(s):

- Compile and submit accreditation self-study (usually requires 9 months)
- Schedule and conduct on-site visit spring 2017

FY 2018 Benchmark(s):

- Provide follow-up documents and reports as required
- Achieve Accreditation September of 2017

Objective 2: Maintain and enhance the Idaho State Archives

Task 1.2.1. Provide research/reference access to archival collections

FY 2017 Benchmark(s):

- Continue process of reviewing historical records with family history research value to be prepared for digitization and access through the Idaho State Archives and Ancestry.com digitization agreement.
- Set-up of a web-based information management system ArchivesSpace for manuscript and photographic collections to improve collection management and provide collection search tool for public access.
- Implement web accessible library catalog to increase access to Idaho State Archives research center historical collections including maps, books, journals, and microfilm collections.

FY 2018 Benchmark(s):

- Using ArchivesSpace, manuscript and photographic collections will be migrated to create accession, description and arrangement of all manuscript holdings to provide efficient access to non-governmental historical collections to all internal and external customers of the Idaho State Archives.
- Using CONTENTdm, a digital collection management system consisting of a server on which content is stored, the Idaho State Archives will maximize impact of digitization projects by implementing criteria for collection selection, expanding scale and ensuring quality metadata, resulting in increased access to primary resource materials across Idaho.
- The Idaho State Archives will continue implementing a replacement online public access catalog to increase access to Idaho State Archives research center collections including state documents collection, maps, books, journals, and microfilm collections.

FY 2019 Benchmark(s):

- Identify and apply for grant funding to complete large-scale digitization projects for high use historical collections to expand access to primary resource materials across Idaho.
- Implement a review of deed documentation and update records in ArchivesSpace to provide more complete information for staff and patrons.
- After completion of archives holdings audit make public platform of Versatile database accessible.

Task 1.2.2. Increase amount of collections accessible to the public by reducing processing backlog

Achieve in 2020

FY 2017 Benchmark(s):

- Government Records Archivists will begin process of quality control review of data migrated from re: discovery to Versatile system to complete phase one of migration
- Processing Archivist will continue overseeing the day-to-day processing of manuscript backlog making use of support from Archivist Technician, Interns and volunteers

FY 2018 Benchmark(s):

- Government Records Archivists will complete process of quality control review of data migrated from re: discovery to Versatile system to complete phase one of migration
- Using new Versatile system government records will begin shelf by shelf audit of entire archival holding and reconcile versatile database holdings to shelf holdings and barcode shelving/boxes per system requirements

FY 2019 Benchmark(s):

- Finalize shelf by shelf audit of entire archival holding and reconcile Versatile database holdings to shelf holdings and begin barcode shelving/boxes per system requirements

Task 1.2.3 Increase amount of archival collections accessible to the public through technology enhancements

FY 2017 Benchmark(s):

- Digitize and provide worldwide access to 50,000 page views of Idaho newspapers through Library of Congress' *Chronicling America* program
- Implement License Partner with *Ancestry.com* to digitize and provide access to vital records, including County Birth & Death records and Prison Records.*
- Apply for phase 3 of The National Digital Newspaper Program (NDNP)
- Implement ArchivesSpace setup; transfer photographs and manuscript records from Proficio into ArchivesSpace.
- Develop criteria and plan for expanding scale of digitization projects to maximize new FY2017 CONTENTdm subscription limit of 50,000 items.

FY 2018 Benchmark(s):

- Upon securing grant funding for phase 3, continue to digitize and provide worldwide access to an additional 50,000 page views of Idaho newspapers through Library of Congress' *Chronicling America* program
- Leverage ArchivesSpace capabilities to capture and aggregate manuscript and photograph collection data improving searchability for staff and public.
- Identify potential grant resources to maximize 50,000 item limit in CONTENTdm.

Externalities: Availability of continued federal grants and private sector partnerships to ensure resources

Task 1.2.4 Build public understanding of and use of archival collections

FY 2017 Benchmark(s):

- Plan and implement 2017 NAGARA/COSA national conference, hosted in Boise
- Create and implement archival collections development plan, with particular focus on water rights collections
- Participate in Spring 2017 Northwest Archivist Boise Conference by offering tours of the Idaho State Archives and Lincoln Legacy Collection
- Promote Idaho State Archives during National Archives Month
- Provide 3 Archives tours to State Legislators during legislative session

- Partner with the Mexican Consulate to create three scholarly programs/ changing exhibitions

Objective 3: Serve State Agency Records Management needs through State Records Center services

FY 2017 Benchmark(s):

- Implement fleet management plan for new vehicle and pallet movers
- Complete the migration from Records Inventory Tracking Software (RITS) to the Zasio Versatile Enterprise system to enhance information governance in Idaho in accordance with the Imerge study recommendations. Project implementation will include:
 - Statewide implementation with continued communications plan, user training and technical support
 - Contract monitoring and vendor compliance
 - Continued collaboration with ISA government records and ISHS fiscal to ensure successful consolidation of services
- Staff participation in the 2017 NAGARA and COSA joint conference
- Evaluate effectiveness of Records Center/State Archives Merger and report to DFM
- Evaluate status of 2012 State Records Study implementation and recommend next steps to DFM
- The State Archives will broaden opportunity and understanding of records management best practices and procedures to state agencies.

FY 2018 Benchmark(s):

- Develop updated procedures for records center's role in state agency records retention schedules and associated destructions in compliance with current best practices and the recommendation of the Idaho Attorney General's Office.
- Partner with state agencies to assist with creating agency unique retention schedules for the fiscal, administrative and legal records created in the daily operations of state agencies.
- Request funding for planning for building expansion of state archives to provide storage space for State Records Center operations to improve efficiency in state records program by consolidating resources and reducing rental costs to include utilities exceeding 100k per year

Objective 4: Efficiently and effectively implement national policy at the state level through the required programs of the National Historic Preservation Act

Task 1.4.1 Manage National Register of Historic Places Program

FY 2017 Benchmark(s):

- Submit completed National Register nomination of the Rapid River Fishery Traditional Cultural Property to the review board
- Process other nominations as received and continue to ensure that those forwarded to the Keeper are of high quality and meet NRHP criteria (This benchmark can be considered an annual constant through 2020.)
- Update National Register program guidance

FY 2018 Benchmark(s):

- Begin Multiple Property Documentation Form for historic property type to be determined later in 2017
- Work with academic, agency, and private sector archaeologists to increase National Register submissions for archaeological sites

FY 2019 Benchmark(s):

- Develop a short FAQ webinar about the National Register in Idaho

FY 2020 Benchmark(s):

- Partner with CLGs to increase survey and identification efforts for potential national Register properties

Task 1.4.2 Provide Idaho voice to federal decision making through required Section 106 review of federal projects

FY 2017 Benchmark(s):

- Continue to provide timely reviews of approximately 2,000 Federal projects under the National Historic Preservation Act of 1966 (as amended). (This benchmark can be considered an annual constant through 2020.)
- Pursue negotiations with the Idaho Department of Transportation to develop a mitigation banking program
- Pursue negotiations with ITD and Federal Highways for funding to operationalize the 2015 feasibility study and implement the Idaho Cultural Resources Inventory System (ICRIS)
- Distribute the Federally- and State-approved State Historic Preservation Plan

FY 2018 Benchmark(s):

- Continue BLM consultation on resolution of Burley Field Office misrepresentations for the period 1997-2007
- Complete the digitization of the SHPO reports library

FY 2019 Benchmark(s):

- Have ICRIS installed and de-bugged

FY 2020 Benchmark(s):

- Realize expected efficiencies of ICRIS, as projected from 2015 feasibility study

Externalities: Changing federal agency priorities, success of ITD/ISHS partnership, acquisition of Federal Highway funds

Task 1.4.3 Increase amount of collections, records and information accessible to the public through technology enhancements

FY 2017 Benchmark(s):

- Complete the update of Universal Transverse Mercator (UTM) coordinates for urban architectural sites
- Implement a Document Management System for digital site forms, reports, and associated review documentation
- Continue to expand and improve the SQL server review and report database
- Pursue grant opportunities through BLM for legacy GIS data
- Publish *Monographs in Idaho Ethnography and Archaeology 2*, in concert with Weber State University
- Complete the scanning at SHPO of 35 mm slides for the Archaeological Survey of Idaho
- Continue populating the polygon dataset in GIS for surveyed areas, based on reports in the SHPO library
- Publish *Monographs in Idaho Ethnography and Archaeology 3 and 4* (Bear River Massacre, Sergeant Ordway's Fishing Lodge)

- Continue the scanning at SHPO of Idaho Historic Sites Inventory (IHSI) reports and manuscripts

FY 2018 Benchmark(s):

- Continue *Monographs* in Idaho Ethnography and Archaeology publication series.
- Complete the scanning at SHPO of Idaho Historic Sites Inventory (IHSI) reports and manuscripts

Objective 5: Steward state-owned historic assets and statewide historic and cultural resources

Task 1.5.1 Enhance impact of Agency re-granting programs, including Community Enhancement Grants, Certified Local Government Grants, State Historic Records Advisory Board Grants, and Governor’s Lewis and Clark Committee Grants

FY 2017 Benchmark(s):

- Implement new CLG Grant distribution model
- Initiate strategic communication to all legislators regarding grant funded projects in their districts
- Ensure that all re-granting awards are agency branded
- Reauthorize Governor’s Lewis and Clark Trail Committee
- Strengthen regional program support and promotion through Trustee engagement

FY 2018 Benchmark(s):

- Identify and support one (1) or more high profile project(s) for funding through the CLG Grant program (This benchmark can be considered an annual constant through 2020.)
- Increase Community Enhancement Grant impact and distribution
- Strengthen regional program support and promotion through Trustee engagement
- Work with Idaho Department of Commerce staff and National Trust for Historic Preservation to strengthen relationship between the Idaho CLG Grant program and the National Trust Main Street program

FY 2019 Benchmark(s):

- Evaluate effectiveness of new CLG Grant distribution model after having completed two (2) cycles of new program; adjust program if/as necessary
- Begin planning for and development of a network of potential funders to help communities provide matching funds for larger projects
- Strengthen regional program support and promotion through Trustee engagement

FY 2020 Benchmark(s):

- Strengthen regional program support and promotion through Trustee engagement

Task 1.5.2 Serve statewide technical assistance needs through outreach for Historic Preservation Planning, Museum Management, and Archives-Records Management

FY 2017 Benchmark(s):

Admin

- Facilitate monthly meeting with Idaho Heritage Partners
- Work with Idaho Heritage Partners to build coalition and plan for state preservation tax credit program
- Collaborate with Idaho Heritage Partners to plan fund implement and evaluate biannual State Heritage Conference

Archives

- Present Records/Archives Management training sessions to Association of Idaho cities and Idaho Association of Counties at their winter and summer meetings
- Plan for Records Management webinar for State Agencies

Museum

- Provide consultation to Idaho Association of Museums to offer professional training and guidance to our state and local museum staff members on a case by case basis

SHPO

- Implement the goals of the revised and updated State Historic Preservation Plan (This benchmark can be considered an annual constant through 2020.)
- Work with communities to develop and implement local preservation plans
- Continue to review and process applications for the federal tax credit program; work with individual owners and architects in the planning stages of tax act projects
- Continue to provide timely and accurate technical assistance to the public
- Continue to provide public lectures and training on the federal tax incentives available for historic preservation projects
- Begin development of a Statewide Disaster Preparedness Plan for historical, cultural, and archaeological resources

FY 2018 Benchmark(s):

Museum

- Continue to partner with Idaho Association of Museums to offer professional training and guidance to our state and local museum staff members
- Create up to four online video resources available through our website on preservation tips and training

SHPO

- Begin developing a context document for the state's farming and ranching history and historic properties
- Complete draft of Statewide Disaster Preparedness Plan; distribute for feedback and revisions

FY 2019 Benchmark(s):

- Continue to partner with Idaho Association of Museums to offer professional training and guidance to our state and local museum staff members
- Complete a context document on the prehistory of Idaho
- Complete and circulate the agricultural context document
- Finalize and distribute Statewide Disaster Preparedness Plan
- Plan for Western Museums Association conference

FY 2020 Benchmark(s):

- Continue to partner with Idaho Association of Museums to offer professional training and guidance to our state and local museum staff members

FY 2021 Benchmark(s):

- Host Western Museums conference

Task 1.5.3 Steward Agency collections and facilities

FY 2017 Benchmark(s):

- Ensure Agency storage facilities meet professional and federally required standards (All)
- Create Agency collections management plan (All)
- Implement increased agency security through expanding patrols to Collections Storage Warehouses, Table Rock, and State Historic Preservation Office (Admin)
- Implement prioritized NARA study recommendations for Agency collections security (ISA)
- Install safety lighting and sidewalks at Old Penitentiary Site (MOP)
- Implement Old Penitentiary Roadway replacement (MOP)
- Renovate the Shirt Factory to provide better public space and artifact storage (MOP)
- Address unaffiliated human remains and develop a research design, analysis budget, and repatriation schedule (SHPO)
- Transfer the Silver City archaeological collections from the Northern to the Western Repository of the Archaeological Survey of Idaho (SHPO)

FY 2018 Benchmark(s):

- Create Agency collections development plan (All)
- Consider legislation to protect state collections from being sold as “assets” (Admin)
- Implement Approved Agency and Alterations and Repairs projects, to improve public access or address deferred maintenance (Admin)
- Ensure optimum efficiency in Collection Storage Warehouse through reconfiguring (Museum)
- Increase on-site security of Collection Storage Warehouse and Capitol Storage Warehouse through ITD partnership (Museum)

FY 2019 Benchmark(s):

- Implement Approved Agency and Alterations and Repairs projects, to improve public access or address deferred maintenance

FY 2020 Benchmarks(s):

- Implement Approved Agency and Alterations and Repairs projects, to improve public access or address deferred maintenance

Task 1.5.4 Provide and enhance public access to Agency Historic Sites

FY 2017 Benchmark(s):

- Explore and implement public events to enhance Old Penitentiary visitation
- Upgrade and improve exhibits on Old Penitentiary site, including those for Women’s Ward, 4 House, new Shirt Factory space
- Enhance educational programming for the JC Earl exhibit
- Complete informational brochure for the JC Earl exhibit

FY 2018 Benchmark(s):

- Work with Franklin Pioneer Association, Friends of Stricker Ranch, and Howard J. Bradbury Logging Museum (Pierce) to develop appropriate educational programming for each of the Agency’s off-site locations
- Enhance public programming on the Old Penitentiary site
- Continue to explore and implement public events to enhance Old Penitentiary visitation
- Continue to upgrade and improve exhibits on Old Penitentiary site

FY 2019 Benchmark(s):

- Continue to work with Franklin Pioneer Association, Friends of Stricker Ranch, and Howard J. Bradbury Logging Museum (Pierce) to develop appropriate educational programming for each of the Agency's off-site locations
- Develop plan for traveling exhibits program that are audience or partnership creations

FY 2020 Benchmark(s):

- Implement Franklin Pioneer Association, Friends of Stricker Ranch, and Howard J. Bradbury Logging Museum (Pierce) to develop appropriate educational programming for each of the Agency's off-site locations

Strategic Plan Goal 2

Funding and Growth: Increase funding and leverage partnerships to advance Agency mission

Objective 1. Realize non-state funding for state museum exhibitions

Task 2.1.1 Manage museum capital campaign and raise \$4 million in non-state support for new state museum exhibitions

FY 2017 Benchmark(s):

- Manage, monitor and evaluate campaign plan and results
- Manage, monitor and evaluate campaign counsel and its effectiveness
- Steward existing donors and cultivate new donors
- Implement "public campaign"
- Implement rotating 30-60-90 day tactical plan
- Continue major gifts campaign
- Raise \$1.5 million in FY 2017

FY 2018 Benchmark(s):

- Raise \$500,000
- Ensure all donor stewardship commitments are fulfilled

FY 2019 Benchmark(s):

- Complete campaign
- Realize all multi-year pledges

Externalities: Competition for other Capital campaigns, percentage of grant success, economic fluctuations

Objective 2. Build membership program

Task 2.2.1 Increase ISHS membership engagement, numbers, and revenue

FY 2017 Benchmark(s):

- Maintain 80% or higher renewal rate with current members
- Develop new membership structure and plan
- Survey and engage current members to understand their needs and optimize new program success
- Ensure ongoing membership communication
- Analyze and develop specifications for customer relationship software

FY 2018 Benchmark(s):

- Implement new membership drive in alignment with museum grand opening
- Implement new customer relationship software license
- Train employees on membership promotion and sales
- Set and evaluate realistic membership goal baseline

FY 2019 Benchmark(s):

- Increase membership 10% from base
- Evaluate program and implement enhancements

Externalities: Capacity to drive program levels

Objective 3. Optimize Grant Development Program

Task 3.1.1 Manage comprehensive Agency grant program and complete reporting requirements on existing Agency grants

FY 2017 Benchmark(s):

- Achieve ISHS Textile Digitization first phase goal
- Finalize Bear River Massacre Landmark NPS Battlefield Protection mapping initiative and final reports
- Prepare and submit Rapid River Tribal Cultural Property nomination through Underrepresented Communities grant received from the National Park Service
- Manage National History Day in Idaho Scholarships
- Manage \$17,500 NHPRC Archives Grant
- Manage NPS Grant for SHPO operations 60/40 federal/state (\$750,000/\$400,000)
- Manage \$10,000 BLM data sharing grant
- Manage BLM grant for archeology and historic preservation month

Task 3.1.2 Submit new grant proposals aligned with annual priorities and opportunities

FY 2017 Benchmark(s):

- NRA Foundation- Earl Exhibition
- Nagel Foundation-National History Day
- Seek NAGPRA consultation/documentation grant for unaffiliated human remains

FY 2018 Benchmark(s):

- Manage comprehensive Agency grant program and complete reporting requirements on existing Agency grants
- Submit new grant proposals aligned with annual priorities and opportunities
- Seek annual grant funding for National History Day in Idaho Scholarships
- Seek annual grant funding for NHPRC Archives Grant
- Manage NPS Grant for SHPO operations (est. annual federal share \$750,000)
Annually secure required state match (est. \$400,000)
- Secure \$10,000 BLM data sharing grant
- Secure BLM grant for archeology and historic preservation month

Externalities: Competition for limited funds

FY 2019 Benchmark(s):

- Manage comprehensive Agency grant program and complete reporting requirements on existing Agency grants

- Submit new grant proposals aligned with annual priorities and opportunities
- Seek National History Day in Idaho Scholarships
- Seek NHPRC Archives Grant
- Manage NPS Grant for SHPO operations (est. annual federal share \$750,000)
Annually secure required state match (est. \$400,000)
Seek stable SHPO match support in the amount of \$200,000 annually
- Secure \$10,000 BLM data sharing grant
- Secure BLM grant for archeology and historic preservation month

Externalities: Competition for limited funds

FY 2020 Benchmark(s):

- Manage comprehensive Agency grant program and complete reporting requirements on existing Agency grants
- Submit new grant proposals aligned with annual priorities and opportunities

Externalities: Competition for limited funds

Objective 4. Build Earned income program

Task 4.1.1 Increase Admissions revenue through promotion and updated fee structure

FY 2017 Benchmark(s):

- Set new fee structure based on input from professional business plan
- Use search engine optimization to enhance our external presence

FY 2018 Benchmark(s):

- Implement new admission fee structure across the agency

Task 4.1.2 Create and promote Comprehensive Facility Rental Program

FY 2017 Benchmark(s):

- Develop facility rental program that creates structure for the Museum, Old Penitentiary, and other Agency sites

Task 4.1.3 Optimize lease revenue

FY 2017 Benchmark(s):

- Ensure all leases are current with no immediate changes needed

Task 4.1.4 Leverage agency fee-based services

FY 2017 Benchmark(s):

- Grow fee-based services by 5% from previous year through promotion

FY 2018 Benchmark(s):

- Create new opportunities for fee-based services to the public (enhanced online presence, etc.)

Externalities: Capacity to drive business plan recommendations and strength of promotions

Task 4.1.5 Leverage Old Penitentiary Revenue

FY 2017 Benchmark(s):

- Develop a 5 year plan for profitable events at the Old Penitentiary
- Increase per person sales

FY 2019 Benchmark(s)

- Improve capacity of the Old Penitentiary Store

Objective 5. Enhance Agency capacity to expand its impact through strategic partnerships

Task 5.1.1 Leverage agency external partnerships

FY 2017 Benchmark(s):

- Extend partnership with Boise City Rotary to maintain and enhance public access at our Table Rock site to include additional public amenities

FY 2018 Benchmark(s):

- Engage in Project LIV in partnership with Boise Parks & Recreation to design and create a public history park on the Assay Office NHL grounds that opens in 2017

Task 5.1.2 Leverage agency internal partnerships

FY 2017 Benchmark(s):

- Maintain existing partnerships for support of museum sites and facilities with Friends of Stricker Ranch, Franklin Pioneer Association, Friends of the Museum and Old Penitentiary, and the City of Pierce and the HJ Bradbury Museum for the Pierce Courthouse historic site

Objective 6. Build capacity of Foundation for Idaho History to support agency

Task 6.1.1 Institute updated bylaws and financial policies

FY 2017 Benchmark(s):

- Evaluate effectiveness of recently adopted bylaws and financial policies

Task 6.1.2 Enhance co-branding of the Foundation for Idaho History with the Idaho State Historical Society

FY 2018 Benchmark(s):

- Design co-branded templates

Task 6.1.3 Increase the Foundation for Idaho History's endowment

FY 2019 Benchmark(s):

- Re-invest annual dividends off current endowment
- Development plan for annual contributions into this endowment

Objective 7. Build impact and effectiveness of non-paid staff

FY 2017 Benchmark(s):

- Analyze current practices and agency volunteer needs

- Recognize annual volunteer contribution to Agency operations

FY 2018 Benchmark(s):

- Develop job descriptions for volunteers aligned with our strategic/annual plans
- Ensure timely onboarding
- Create measurement metrics (cost avoidance financials and value of contribution)

FY 2018 Benchmark(s):

- Measure comprehensive volunteer impact

Strategic Plan Goal 3

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

Objective 1. Develop a comprehensive marketing plan in coordination with new marketing/public relations agency

Task 3.1.1 Evaluate current promotions being conducted by agency and implement new plan

FY 2017 Benchmark(s):

- Compare target market areas to industry standards
- Develop a per person cost for all marketing efforts
- Review agency brand and designs
- Implement changes based on initial research
- Train staff on updated brand development
- Utilize news forms of advertisement outside of the traditional methods
- Implement tactical marketing plans including attendance, rental, and events/membership based upon annual plan priorities

Task 3.1.2 Create and implement a new agency website

FY 2017 Benchmark(s):

- Conduct updated needs analysis with staff and users
- Research other state agency websites and other history sites that are user friendly
- Communicate with the partners creating new content in conjunction with new museum to ensure website can handle new content sections with no issues

FY 2018 Benchmark(s):

- Choose vendor through RFP process to design the new website
- Implement new website so that is live before the museum opens
- Integrate additional outreach programs into the updated website

FY 2019 Benchmark(s):

- Use Google Analytics and state reporting to measure success of new website versus old website

Task 3.1.3 Create and implement a new agency social media plan

FY 2017 Benchmark(s):

- Evaluate planning that is already taking place in the Communication and Development Committee

- Evaluate if new social media mediums need to be used
- Grow followers on each of our various sites by 10%

Task 3.1.4 Create and implement a new agency donor database

FY 2017 Benchmark(s):

- Conduct updated needs analysis with staff and users
- Research available donor database and POS systems

FY 2018 Benchmark(s):

- Choose vendor through RFP process to design the new database
- Implement new database that tracks communications, donors, point of sale information, volunteers, and events
- Train staff on the use of new database
- Assign staff within each unit specific responsibilities related to their positions
- Grow database size by 15% compared to previous years

Strategic Plan Goal 4

Organizational development and infrastructure: Foster a sustainable high performance work culture

Task 4.1.1 Optimize skill and performance levels for agency staff

FY 2017 Benchmark(s):

- Assess and recruit for specific skills sets for agency staff, trustees, and volunteers
- Implement “onboarding” and ongoing agency and individual training
- Manage ongoing performance
- Offer six in-house training opportunities

Task 4.1.2 Optimize Agency Financial Management systems and processes

FY 2017 Benchmark(s):

- Manage and monitor cash flow from private, state, and federal sources to ensure State Museum Exhibitions design build contract is fulfilled and deliverables realized in a timely basis
- Monitor Performance of design build contractor(s)
- Ensure revenues and expenditures are coded correctly to track grant and agency expenditures and revenues
- Manage agency contracts and leases

Externalities: Adherence to all State and Federal regulations

FY 2018 Benchmark(s):

- No findings or recommendations in the audit for the period FY2015-2017 that will be completed in FY2018

Task 4.1.3 Optimize Agency Information Technology systems and processes

FY 2017 Benchmark(s):

- Assess network bandwidth at Museum, History Center, Old Penitentiary, State Historic Preservation Office, and Collection Storage Warehouses
- Inventory and evaluate current computer hardware

- Inventory software licensing and assure compliance
- Design and implement ISHS SharePoint intranet website
- ISHS website redesign to integrate Historic Dress Digitization content, Tiny Stories and Museum video tours
- Evaluate and analyze website visits

FY 2018 Benchmark(s):

- Assure software licensing compliance
- ISHS internet website maintenance
- Increase website visits
- Update computer hardware retirement/replacement program

Idaho State Historical Society Statutory Authorities

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 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 to 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 providing 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.

Idaho State Historical Society Agency Management, 2016

The board of Trustees of the Idaho State Historical Society is the designated policy-making and governance body for the Agency, is appointed by the Governor, and has all of the powers and duties established by the Constitution of the State of Idaho.

While the board is responsible for ensuring that Agency statutes, policies and procedures are followed, it delegates the internal management of the organization to the executive director of the Society.

The Idaho State Historical Society is one of 22 states in the United States considered a full-service Agency, (one that is the umbrella for multiple entities, including the State Museum, State Archives, SHPO, and Sites).

In order to maximize creativity and efficient and effective use of its resources, encourage entrepreneurship, and because of the complex nature of its multiple businesses, the Agency practices a *Participative Management Style*.

The leadership team of the Idaho State Historical Society Historical Society is comprised of the heads of the Agency's major departments/functions and includes the Executive and Associate Directors, Administrators including the Museum and Old Penitentiary, Development, State Archeologist, State Archivist, Fiscal Officer, and Human Resources and Information Technology Coordinators.

The leadership team works collectively on matters of Agency organizational development, strategic planning, program development and evaluation, marketing, personnel issues, and budget and fiscal matters. This is done through a number of tactics including making annual recommendations to the board on Agency priorities and budget priorities that set the framework for departmental planning. The leadership team translates the broad goals of the strategic plan, annual program, and fiscal priorities into their respective departmental work plans through dialog with staff.

Leadership Principles

- We evaluate and maximize position vacancies with an eye to the future of the entire agency
- We commit to systematically evaluating our structure, resources, productivity, and compensation for the benefit of our agency performance and staff We support our agency decisions at the department level
- We agree to dialog and communicate about new opportunities and their impacts
- We agree that individual performance will align with department and agency objectives
- We model the behavior we want to achieve a purposeful work culture
- We support staff training and professional development to the best of our ability

The leadership team is responsible for presentation of action items to the board of Trustees on a quarterly basis, for managing Agency performance and solving key challenges through one annual planning retreat and two work sessions monthly, and for insuring that the work environment facilitates effective communication and results.

Agency Brand

In order to meet our revenue goals and optimize public awareness and participation in agency services through enhanced brand identity, web-site, marketing and outreach, ISHS will:

Market to target audiences:

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

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

Organizational Attributes

- Credible
- Passionate
- Trusted
- Responsive
- Wide Reaching
- Co-operative/collegial

Brand Promise

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

Develop marketing plans to reach key target audiences and meet revenue goals: The plans will provide clearer focus, organization and division of responsibilities, and outcomes.

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

Key Messages:

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