

WASHINGTON STATE HISTORICAL SOCIETY

Strategic Plan
2007-2013

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Washington State Historical Society
Strategic and Action Plan, FY 2007-2013

A leadership document establishing institutional priorities and operational directions

VISION

To be a highly valued historical resource offering premier educational and recreational opportunities for Washington's citizens, visitors, and others interested in our state's history.

MISSION

As custodian of Washington's history and our state's storyteller, we engage audiences by:

- Presenting innovative educational opportunities including exhibits, programs, publications, and on-line curricula and digital resources that make Washington's history relevant in a national and international context.
- Collecting, preserving, and making accessible materials that represent our history.
- Partnering with varied organizations, agencies and communities statewide.
- Encouraging the heritage activities of others.

STATUTORY AUTHORITY

The Washington State Historical Society was founded as a non-profit organization in 1891 and officially chartered in 1903 by the Legislature as a trustee agency, thereby operating under the provisions of RCW 27.34. The Society, as an agency, also operates in accordance with all other state laws, its own by-laws, and other governing policies as established by the Board of Trustees of the Society.

VALUES

- Customer Focus
- Entrepreneurial Spirit
- Professional Integrity
- Exemplary Performance
- Public Accountability
- Statewide Service
- Honoring Diversity
- Collaborative Attitude

GOALS of ENDURING VALUE

- Champion state and local history
- Make historical observances meaningful and memorable
- Create significant venues for WSHS interpretive programming
- Strengthen institutional capacities
- Engage organizations, agencies and communities statewide through outreach and effective partnerships
- Preserve the physical assets of WSHS

GOALS with OBJECTIVES

1. Champion state and local history

- Develop content-driven educational media for use in K-12 with corresponding promotional commitments and measurable rates of adoption.
- Establish relationships with history and social studies teachers and curriculum developers, focusing particularly on Washington History Online and National History Day.
- Increase access to WSHS collections through an expansion of digital assets and online research tools.
- Develop a new Collecting Plan to facilitate acquisition of new materials with strong research and educational potential.
- Strengthen the Heritage Resource Center to reflect its continuing mission as a statewide information clearinghouse.

2. Make historical observances meaningful and memorable.

- Develop a Washington-based women's history curriculum for placement on Washington History Online.
- Provide technical assistance to communities planning commemorative events.
- Study opportunities for traveling exhibits associated with the Abraham Lincoln bicentennial (2009), the Civil War sesquicentennial (2010-2015) and the Alaska-Yukon-Pacific Exposition (2009) and women's suffrage (2010) centennials.

3. Create significant venues for WSHS interpretive programming

- Participate in development of the proposed Washington Heritage Center and other opportunities for interpretive exhibit development on the Capitol Campus.
- Continue restoration, replication and digitization of Legislative Building Mural Art collection.

4. Strengthen institutional capacities

- Expand and enhance technology infrastructure agency-wide to support inter-agency transactions and digital initiatives, including Washington History Online and the Women's History Consortium.
- Complete Museum and Special Collections inventories.
- Increase membership and private donations, including annual fund, grant and major gift contributions.
- Refine customer survey capabilities for exhibition and program evaluation to maintain accreditation and to enhance marketing assessment and audience analysis.
- Increase museum-wide and exhibition specific sponsorships to maximize exposure for the institution and increase museum attendance.

5. Engage Washington's diverse communities through outreach and effective partnerships

- Implement recommendations of the inter-departmental forum on civic engagement.

- Mount high-quality temporary exhibitions likely to elicit attention from communities of interest.
- Explore a strategic partnership with Washington State Parks, including joint development of exhibitions and study of collections consolidation under WSHS auspices.
- Launch the Washington Women's History Consortium, drawing on the expertise of its advisory committee to implement its commemorative and academic goals.
- Maintain programmatic ownership of National History Day in Washington State, and continue to implement strategies for outreach and growth.
- Launch a Native American Arts Festival.

6. Preserve and enhance the physical assets of WSHS

- Maintain, augment or replace portions of the Great Hall of Washington History and the History Lab.
- Update and enhance telecommunications and data storage capabilities of all WSHS facilities.
- Conduct a pre-planning study for expansion of the Research Center by July 2009.
- Implement the new architectural program plan for the Lord Mansion by July 2009.
- Schedule replacement for electronic components of permanent exhibits.
- Update the Facilities Condition Report biennially.
- Update the 10-year facilities maintenance plan biennially.

PERFORMANCE MEASURES

Output Measure: Percentage of the artifact collection inventoried [OFM tracking #0310]

Output Measure: Cumulative number of collection items digitized [OFM tracking #0806]

Output Measure: Maintain accreditation from the American Association of Museums [OFM tracking #0721]

Output Measure: Number of conference & public program attendees [OFM tracking #0840]

Output Measure: Number of students participating in National History Day [OFM tracking #0731]

Outcome Measure: Good or Excellent rating for educational quality in customer (Morey) survey [OFM tracking #0741]

Outcome Measure: Good or Excellent rating on teacher survey [OFM tracking #0870]

Output Measure: Number of students served by on-site classes

Outcome Measure: Good or Excellent rating in customer survey [OFM Tracking #0210]

Output Measure: Number of museum visitors for both the Washington State History Museum and the Washington State Capital Museum [OFM Tracking #0120]

Outcome Measure: Good or Excellent rating for cleanliness in customer Survey [OFM tracking #0800]

Outcome Measure: Good or Excellent rating for exhibit quality in the customer survey. [OFM tracking #0771]

STRATEGIES

The society has the following seven overarching strategies for achieving its goals. Agency goals are developed to meet the statewide priority of government to improve cultural and recreational opportunities throughout the state.

1. The Washington State Historical Society will continue to provide sound stewardship of the organization's core asset, its diverse historical **Collection**, by:
 - Maintaining the current pace to complete the cataloging and inventory of the artifact collection;
 - Upgrading the existing collection management software system;
 - Making appropriate additions to the collection to support Washington History Online (WHO) and other projects;
 - Planning for an expansion of the Research Center building to meet future storage needs; and
 - Exploring a partnership with State Parks to accommodate their collections

Connection to agency goals

Agency Goal 1—Champion state and local history

- Develop content-driven educational media for use in K-12 with corresponding promotional commitments and measurable rates of adoption.
- Increase access to WSHS collections through an expansion of digital assets and online research tools.
- Develop a new Collecting Plan to facilitate acquisition of new materials with strong research and educational potential.

Agency Goal 3—Create significant venues for WSHS interpretive programming

- Participate in development of the proposed Washington Heritage Center and other opportunities for interpretive exhibit development on the Capitol Campus.
- Continue restoration, replication and digitization of Legislative Building Mural Art collection.

Agency Goal 4—Strengthen institutional capacities

- Complete Museum and Special Collections inventories.

Principal Activities Achieving Goals: Acquire and Maintain Historic Collection

2. The **Education Department** will produce exceptional educational experiences for teachers, students and the general public by integrating information and resources from throughout WSHS by:

- Assessing the Great Hall of Washington History in light of Washington State Essential Academic Learning Requirements and planning updates in exhibition content to coordinate with and incorporate these learning targets for K-12 instruction;
- Continuing to expand the curricular modules available to in-classroom K-12 instruction through the Washington History Online (or EDI) project;
- Assessing the History Lab in light of new curricular materials developed for Washington History Online and planning for its revision;
- Developing an updated version of the History Lab that serves as both a museum-based venue for Washington History Online curricular materials and as a testing site for new Washington History Online curricular materials under development;
- Objectively evaluating and testing Washington History Online materials and measuring its adoption rate and effectiveness in achieving learning outcomes;
- Promoting WSHS educational materials around the state; for example at teacher training institutes and in the field

Connection to agency goals

Agency Goal 1—Champion state and local history

- Develop content-driven educational media for use in K-12 with corresponding promotional commitments and measurable rates of adoption.
- Establish relationships with history and social studies teachers and curriculum developers, focusing particularly on Washington History Online and National History Day.

Agency Goal 2—Make historical observances meaningful and memorable

- Develop a Washington-based women’s history curriculum for placement on Washington History Online.

Agency Goal 4—Strengthen institutional capacities

- Expand and enhance technology infrastructure agency-wide to support inter-agency transactions and digital initiatives, including Washington History Online and the Women’s History Consortium.

Agency Goal 5—Engage Washington’s diverse communities through outreach and effective partnerships

- Maintain programmatic ownership of National History Day in Washington State, and continue to implement strategies for outreach and growth.

Agency Goal 6—Preserve and enhance the physical assets of WSHS

- Maintain, augment or replace portions of the Great Hall of Washington History and the History Lab.

Principal Activities Achieving Goals: Historical Education

3. The **Exhibits Department** creates and maintains exhibits that have historical accuracy, intellectual rigor, community interest and emotional power by combining disparate resources in novel and powerful ways.

- Using customer evaluations including focus groups, scholars’ expertise, and Agency planning expertise, design a 10-year master plan for modular replacement of exhibit elements in the Great Hall of Washington History, and implement first phase.
- Use Agency planning, design, and scholarly expertise and partnerships with other agencies and community groups to develop exhibits in the Lord Mansion, Heritage Center, State Parks, and Women’s History Consortium.
- Use Agency contacts, scholar expertise, and customer surveys to select and evaluate exhibit possibilities, balancing exhibits that interpret Washington history and those that interpret US National history.
- Using exhibit teams, and increased design and project-management procedures within Exhibits, cooperate with other departments, especially Education, Collections, and Marketing, in developing exhibits.

Connection to agency goals

Agency Goal 2—Make historical observances meaningful and memorable.

- Study opportunities for traveling exhibits associated with the Abraham Lincoln bicentennial (2009), the Civil War sesquicentennial (2010-2015) and the Alaska-Yukon-Pacific Exposition (2009) and women’s suffrage (2010) centennials.

Agency Goal 3—Create significant venues for WSHS interpretive programming

- Participate in the development of the proposed Washington Heritage Center and other opportunities for interpretive exhibit development on the Capitol Campus.

Agency Goal 4—Strengthen institutional capacities.

- Refine customer survey capabilities for exhibition and program evaluation to maintain accreditation and to enhanced marketing assessment and audience analysis.
- Increase museum-wide and exhibition-specific sponsorships to maximize exposure for the institution and increase museum attendance.

Agency Goal 5—Engage Washington’s diverse communities through outreach and effective partnerships.

- Mount high-quality temporary exhibitions likely to elicit attention from communities of interest.
- Explore a strategic partnership with Washington State Parks, including joint development of exhibitions and a study of collections consolidation under WSHS’ auspices.
- Launch the Washington Women’s History Consortium, drawing on the expertise of its advisory committee to implement its commemorative and academic goals.
- Launch a Native American Arts Festival.

Agency Goal 6—Preserve and enhance the physical assets of the WSHS.

- Maintain, augment or replace portions of the Great Hall of Washington History and the History Lab.
- Implement the new architectural program plan for the Lord Mansion by July 2009.

Principal Activities Achieving Goals: State Historical Exhibits

4. The **Museum Operations and Facilities Maintenance Departments** enhance educational and recreational experiences for all users of the Society's assets by preserving the facilities (Washington State History Museum, Washington State Capital Museum, and the Research Center) and the artifacts and archival materials that record and illustrate the history of our state. The facilities also house the exhibits and programs that give access to and enhance public participation in history, including historic commemorations. Educational and recreational experiences will be provided for into the future by expanding the Research Center to allow continued collecting of the State's history and by adaptive reuse of the State Capital Museum into the State History Outreach Center. The Outreach Center will provide expanded space for program activities of the Women's History Consortium, National History Day and the Heritage Resource Center. This opportunity will be enhanced by improved exhibit space being planned on the Capital Campus.

Connection to agency goals

Agency Goal 3—Create significant venues for WSHS interpretive programming

- Participate in the development of the proposed Washington Heritage Center and other opportunities for interpretive exhibit development on the Capitol Campus

Agency Goal 6—Preserve and enhance WSHS physical assets

- Maintain, update or augment portions of the Great Hall of Washington History and the History Lab.
- Conduct a pre-planning study for expansion of the Research Center by July 2009.
- Implement the new architectural program plan for the State Capital Museum (Lord Mansion) by July 2009.
- Schedule replacement for electronic components of permanent exhibits.
- Update the Facilities Condition Report biennially.
- Update the 10-year facilities maintenance plan biennially.

Principal Activities Achieving Goals: Museum Operation and Facilities Maintenance

5. Outreach Services provides needed technical and financial resources to individuals, organizations, tribes and other governments that are doing heritage work in their communities or statewide. The agency provides service through its Heritage Resource Center, Heritage Conference, Pacific Northwest History Conference, Traveling Exhibits Service, National History Day office, Heritage Caucus, and State Capital Museum, as well as the Center for Columbia River History, in which the agency is one of three partners. In addition, service is provided by the newly created Women’s History Consortium, which, under the guidance of its advisory board, works with partner agencies and local entities to identify, preserve and make available women’s history sources and will plan the commemoration for the centennial of Washington women’s suffrage in 2010.

Connection to agency goals

Agency Goal 1—Champion state and local history

- Establish relationships with history and social studies teachers and curriculum developers, focusing particularly on Washington History Online and National History Day.
- Strengthen the Heritage Resource Center to reflect its continuing mission as a statewide information clearinghouse

Agency Goal 2—Make historical observances meaningful and memorable

- Provide technical assistance to communities planning commemorative events.
- Study opportunities for traveling exhibits associated with the Abraham Lincoln bicentennial (2009), the Civil War sesquicentennial (2010-2015) and the Alaska-Yukon-Pacific Exposition (2009) and women’s suffrage (2010) centennials.

Agency Goal 3—Create significant venues for WSHS interpretive programming

- Participate in development of the proposed Washington Heritage Center and other opportunities for interpretive exhibit development on the Capitol Campus.

Agency Goal 5—Engage Washington’s diverse communities through outreach and effective partnerships

- Explore high-level strategic partnership with Washington State Parks, including joint development of exhibitions and study of collections consolidation under WSHS auspices.
- Mount high-quality temporary exhibitions likely to elicit attention from communities of interest.
- Launch the Washington Women’s History Consortium, drawing on the expertise of its advisory committee to implement its commemorative and academic goals.
- Maintain programmatic ownership of National History Day in Washington State, and continue to implement strategies for outreach and growth.
- Launch a Native American Arts Festival.

Principal Activities Achieving Goals: Community Outreach Activities

6. By providing executive leadership and sponsorship for the agency new information technology initiative, agency **Administration** will transform the agency's administrative infrastructure to support the Washington State Roadmap Business Initiatives by:

- providing an agency intranet, opening a place for team collaboration and making it easy for users to work together on documents, tasks, events and other information;
- increasing purchase card usage for small items and routine purchases to lower costs of goods and services (SmartBuying), thereby freeing funds for the direct program;
- providing online self-service access to all agency policies and procedures, freeing staff time for more direct delivery of services;
- creating remote access to the Agency Revenue Management System, allowing non-headquarters staff to enter cash transactions online and see real-time revenue status, thereby enabling more informed decision making.

Connection to agency goals

Agency Goal 4—Strengthen institutional capacities

- Expand and enhance technology infrastructure agency-wide to support inter-agency transactions and digital initiatives, including Washington History Online and the Women's History Consortium.

Principal Activities Achieving Goals: Agency Administration

7. The **Member, Donor and Public Relations** team raises community awareness of the Society's programs, exhibits, and services through strategic marketing initiatives and media relations. It contributes to self-sustainability through admissions, other earned revenue including membership and special projects, and contributed revenue from public and private sources. It seeks corporate sponsorships for marketing and promotional purposes for temporary exhibits, serves as a grant management resource for the Society, and conducts an annual fund campaign and membership drives. Member, Donor and Public Relations plans, promotes and executes annual public events for the Washington State History Museum. The department also satisfies customer needs and expectations and works with various communities throughout the state on partnerships that include marketing, promotion and earned revenue projects.

Connection to agency goals

Agency Goal 4—Strengthen institutional capacities

- Refine WSHM survey capabilities for exhibition and program evaluation to maintain accreditation and to enhance marketing assessment and audience analysis.
- Increase membership and private donations, including annual fund, grant and major gift contributions.
- Increase both museum-wide and exhibition specific sponsorships to maximize exposure for the institution and increase museum attendance

Agency Goal 5—Engage Washington's diverse communities through outreach and effective partnerships

- Launch a Native American Arts Festival
- Implement recommendations of the inter-departmental forum on civic engagement

Principal Activities Achieving Goals: Member, Donor and Public Relations

APPRAISAL of EXTERNAL ENVIRONMENT

The Society's biannual assessment of Strengths, Weaknesses, Opportunities and Threats (SWOT) is the framework for our appraisal of the environment within which our agency operates. In our most recent assessment we discern several strengths. First and foremost is our positioning within state government as the perceived leader in telling the state of Washington's story. For example, when the Washington State Legislature looked for an agency to lead the planning for both the Lewis & Clark Bicentennial and the Centennial of Women's Suffrage in Washington, they designated the Washington State Historical Society for these responsibilities. The Society can take on these duties because of a flexible and adaptive staff, and an organizational culture of true empowerment. We are committed to interagency team play. The State History Museum in Tacoma, our flagship enterprise, is regarded as one of the best of its kind in the nation and continues to generate very high customer satisfaction ratings, a function of its powerful storytelling approach to exhibitions and strong customer orientation.

As noted in earlier appraisals, the History Museum holds a particular appeal to the book-end generations—elementary school students at one end, and more senior citizens on the other. The sophistication in approach to these distinct cohorts is dramatically different, with youngsters typically needing broad bands of topical consideration—prehistoric, ancient, medieval, pioneer, and the like—while older audiences with lived experiences relish stories with more particularized nuances, such as our *9/11* and *Pulitzer Prize Winning Photographs* exhibits.

Nevertheless, WSHS evidences certain weaknesses. While we have achieved state standards in technology infrastructure, continuous operating fund investment of state monies is necessary to maintain the current level. The Society has tremendous upside potential for e-commerce (membership, donations, and the sale of images) that has not yet been realized, representing lost opportunities for self-support. The earnest recovery in the job market has made agency staff recruitment and retention an emerging issue. The demands of coping with the personnel reform law for an agency with only three full-time administrators presents an additional challenge.

For opportunities, we see emerging public interest in the stories of the last half of the twentieth century, a time period that also lends itself to the prospect of significant growth of collections. With the fraying of many civic traditions, museums are increasingly seen by diverse constituencies as a forum for community engagement. The continuing digital revolution makes it easier for customers to discern our offerings, preparatory to a visit, or to utilize online services.

A major threat is the still uncertain status of social studies/state history in this state's curriculum and competition from superficial digital sources of historical information. Any diminution of the state's commitment to the value of Washington state history or social studies generally will have a significant effect on the perceived value of the resources that we collect and interpret in such media as exhibits or publications (literary and digital). Conversely, a strong partnership with the Office of the Superintendent of Public Instruction (OSPI), taking full advantage of our unique collections in state history plus our ability for powerful story telling, could significantly impact results derived from the state's budget investment in *two* Priorities of Government—student achievement and cultural/recreational opportunities.

TRENDS in CUSTOMER CHARACTERISTICS

The Society conducts an annual visitor survey at the History Museum which provides our principal insight into market trends. Our most recent survey provided the following key results and conclusions. First, we continue to see an increase in repeat visitors who respond favorably to

the quality of their experience generally, and the maintenance of our facility and exemplary employee courtesy ratings in particular. The primary reason for visiting the History Museum remains, as one would expect, an interest in Washington State History. Typically, the primary reason for visiting any cultural attraction is an interest in the subject matter. It is also clear that creating a competitive profile relative to other leisure time activities is vital to meeting customer expectations, including advertising and an effective web-site. Our last survey revealed that the museum has broadened its audience since the previous survey period, with respondents generally being younger and more ethnically diverse.

STRATEGY and CAPACITY ASSESSMENT

In the 1990s, when the first phase of the digital revolution was taking place, the Historical Society was preoccupied with the capitalization, design, construction, and initial operation of the new History Museum in Tacoma and adoption of the State Capital Museum in Olympia. This was followed (1999-2005) by the requirements of exercising leadership in planning the inter-agency observance of the Lewis and Clark bicentennial. (There remain residual post-bicentennial obligations on this front related to the finalization of projects in the new Lewis & Clark National Park in Pacific County.) This sequence of obligations allowed for minimal consideration of the new digital paradigm that, using the expression of Thomas Friedman, was beginning to “flatten” the world at that time.

Based on the success of the Lewis & Clark commemoration, the Legislature charged the Society with taking the lead on a successor historical celebration, the centennial of women’s right to vote in Washington (1910-2010). The Society now has a proven track record of being able to visualize and actualize the oft-elusive “interagency team play.” The women’s suffrage centennial is itself the vanguard element in the programmatic development of the Women’s History Consortium (WHC), created by statute in 2005 and based at WSHS. The centennial will do much to give visibility to the study of women’s history and lay the foundation for a sustained emphasis on the subject.

The leading edge of the WHC effort is a web-based delivery system, which we could agreeably take on as the managing partner of the consortium only because of executive branch and legislative support of our educational digital initiative, or more particularly its technical underpinnings. Here we refer to the additional general fund operating support for the current biennium supplemented by repurposed non-state financial assets that allowed the Society to create a nascent Information Technology department. With continued baseline support of the Society’s information systems we can leverage our agency’s entrepreneurial culture into a web-based delivery system for women’s history and the broad range of Washington state history through such techniques as weblogs, wikis, and RSS services. Of course, the principal differentiator and value the Society brings with its mission and quest for indispensability as a productive element within the larger corporate entity of Washington state government, is our leadership in the creation of online historical assets. In March 2006 the Society has launched, in prototype form, its new web portal—Washington History Online (formerly Educational Digital Initiative or EDI). To accomplish the ambitious goals set for this project, the Society needs to continue to make Information Technology systems planning a priority. This may necessitate further staff reorganization and redeployment in order to take full advantage of delivering our services statewide through digital media.

PERFORMANCE ASSESSMENT

The pending conclusion of the Lewis and Clark Bicentennial is a fitting occasion to mark the completion of agency goals for the commemoration. The Lewis and Clark National Historical Park was dedicated in November 2004, linking sites in Washington and Oregon to provide visitors and residents a more fully realized experience of the Expedition on the lower Columbia River. The installation of the largest set of highway interpretive markers in state history was completed in 2005, ensuring that drivers can see the explorers' story unfold as they travel the Lewis and Clark Trail. More than 60,000 visitors came to Corps of Discovery II, a traveling exhibition conducted in partnership with WSHS, which provided programs, funding and staff support at seven sites in Washington.

The Washington State Historical Society is well on its way to achieving the performance measures set for the current biennium (05-07), which set the stage for the agency's transition into the digital age. In March 2006, WSHS unveiled Washington History Online (WHO), its web-based doorway to an array of educational materials designed to bring Society collections and collective historical expertise into classrooms far removed from the Tacoma headquarters. The curricular component of WHO offers three modules that meet state standards for required assessments in social studies. These online interactive educational resources are an innovative way to expose an expanded audience to the artifacts and ephemera that comprise Washington history.

Washington History Online is an online portal to two new programs that will expand WSHS's digital presence and raise its profile with new audiences. The Washington Women's History Consortium, created by statute in 2005 and institutionally housed at the Society, oversees the 2010 centennial commemoration of women's suffrage and will create a digital clearinghouse of women's history resources, virtually gathering widely dispersed materials into one central place. Two new online women's history curricula are planned, extending the utility of WHC into classrooms statewide. National History Day, an innovative history education program for grades 6-12 that teaches students critical thinking, writing, research and presentation skills, can be used to meet state assessment standards in social studies, and WSHS works with OSPI and other educational institutions to maximize the impact of this program.

The backbone for these digital innovations is agency technology infrastructure. In accordance with objectives set in the last biennium, hardware and software upgrades throughout WSHS's facilities have been completed, a staff redeployment continues to develop, and the agency now meets state standards for technology—although continued investment of state operating monies will be necessary to maintain standards—and has instituted regular staff training.

More specific measures indicate steady or improved performance related to customer experience. Attendance increased 14 percent between 2002 and 2005 (six percent between 2004 and 2005 alone). Our most recent visitor survey shows that customer satisfaction remains seven percentage points above the industry benchmark. The Washington State History Museum's rating for educational excellence is significantly higher than the industry average. Facility cleanliness and employee courtesy receive exceptionally high marks from customers as well.

Nonetheless, WSHS faces continuing challenges. Membership has dropped slightly since 2004, possibly reflecting customers' preference for single-pay visits. The Research Center and the Washington State Capital Museum, two satellite facilities, demonstrate strain on existing capacities. The State Capital Museum is undergoing a use assessment that will likely result in a repurposing of the building to reflect the Society's focus on outreach services and digital resources. The Research Center storage capability is approaching its outer limits; building expansion is under study.