

WASHINGTON STATE HISTORICAL SOCIETY

Strategic Plan 2009-2015

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www.washingtonhistory.org

WASHINGTON STATE HISTORICAL SOCIETY

Vision:

To be Washington's flagship historical organization offering resources and services to citizens, visitors, and others interested in our state's history.

Mission:

By preserving and interpreting the stories, images, and objects of our state's past, the Washington State Historical Society helps residents and visitors understand the present and shape the future.

Values:

Innovation
Integrity
Scholarship
Accountability
Service
Diversity
Community engagement

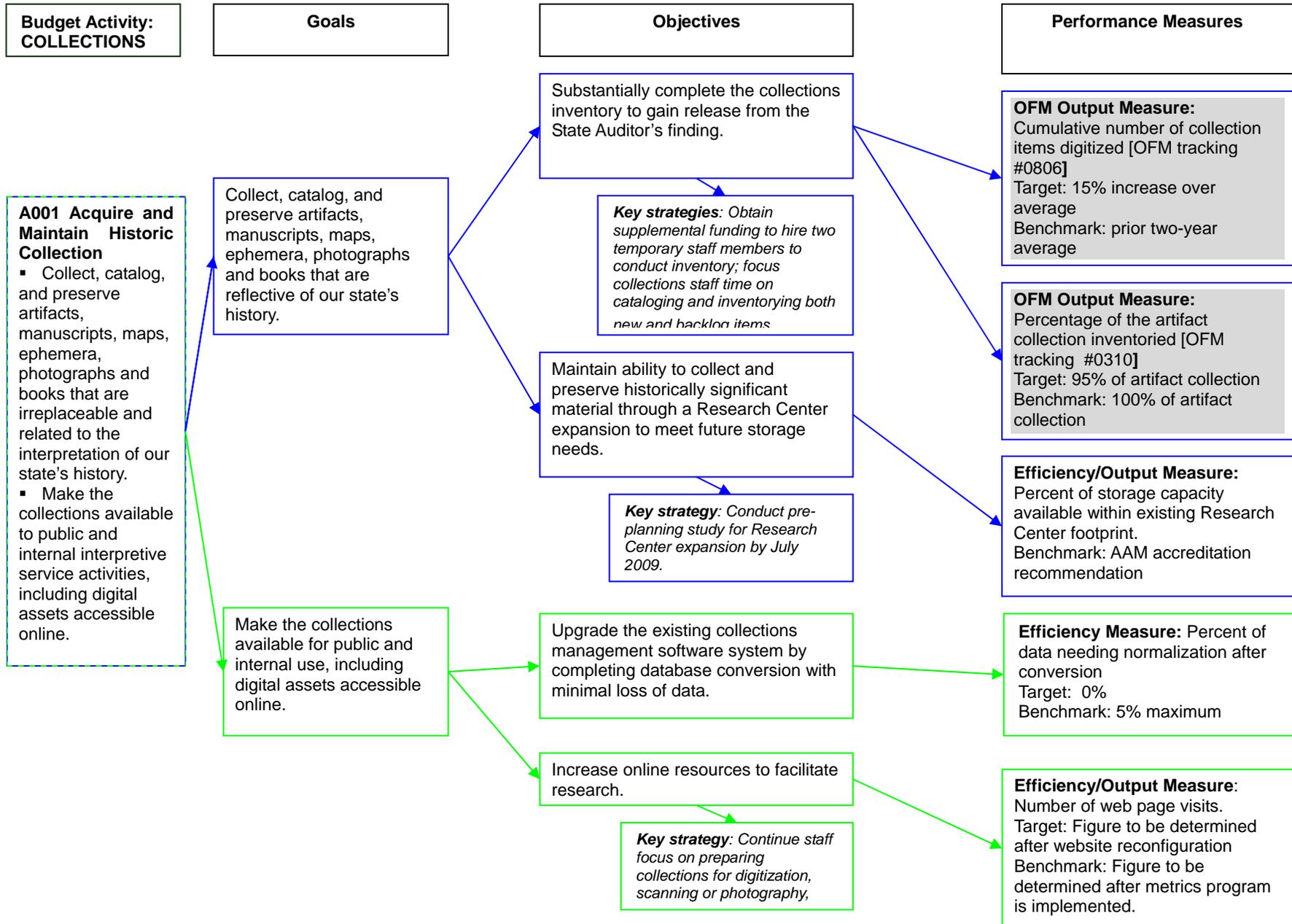
Statutory Authority:

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.

COLLECTIONS

Priority of Government (POG) Statewide Result Area: Improve cultural and recreational opportunities throughout the state.

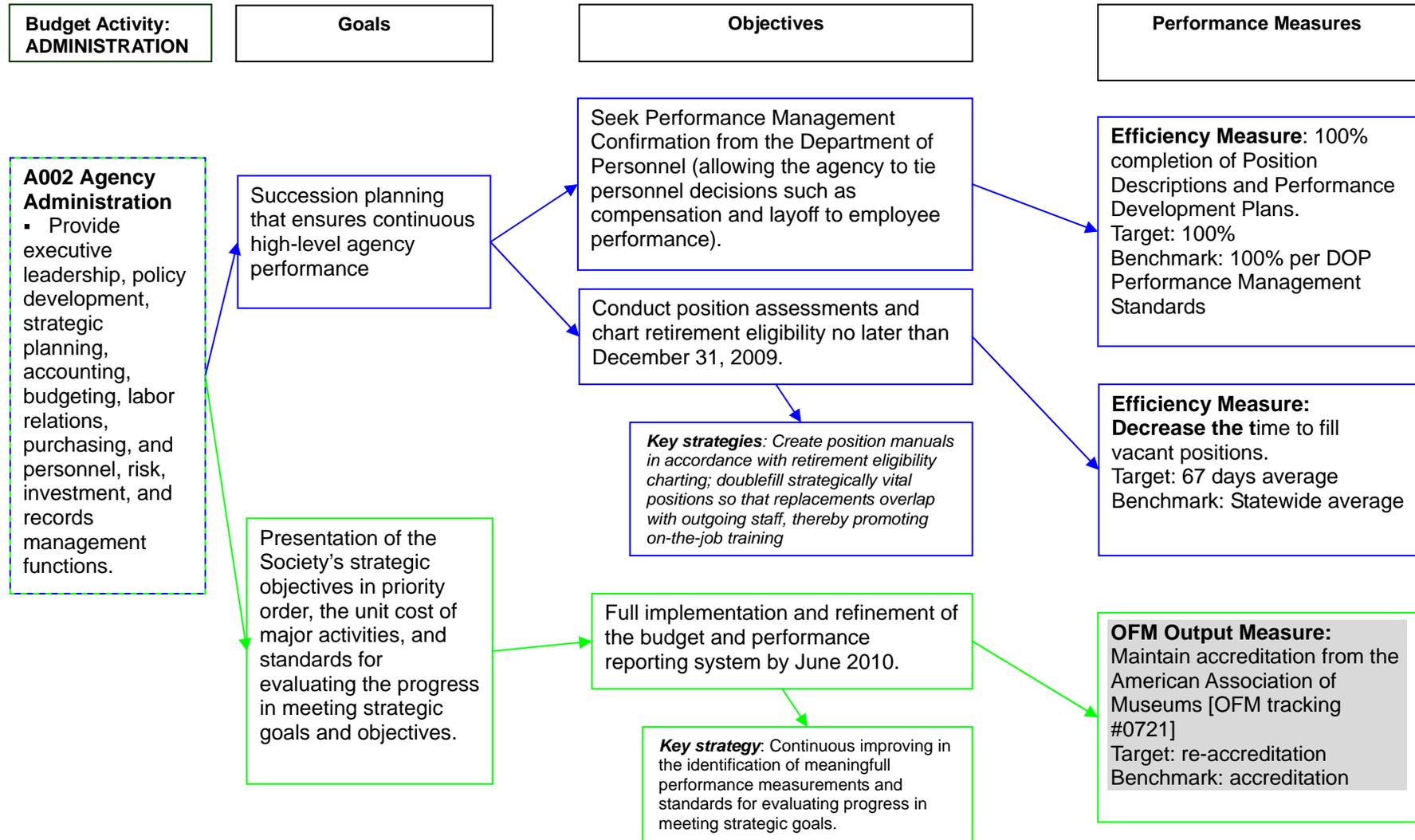
Statewide Strategy: Provide stewardship of cultural and recreational assets.



ADMINISTRATION

Priority of Government (POG) Statewide Result Area: Improve cultural and recreational opportunities throughout the state.

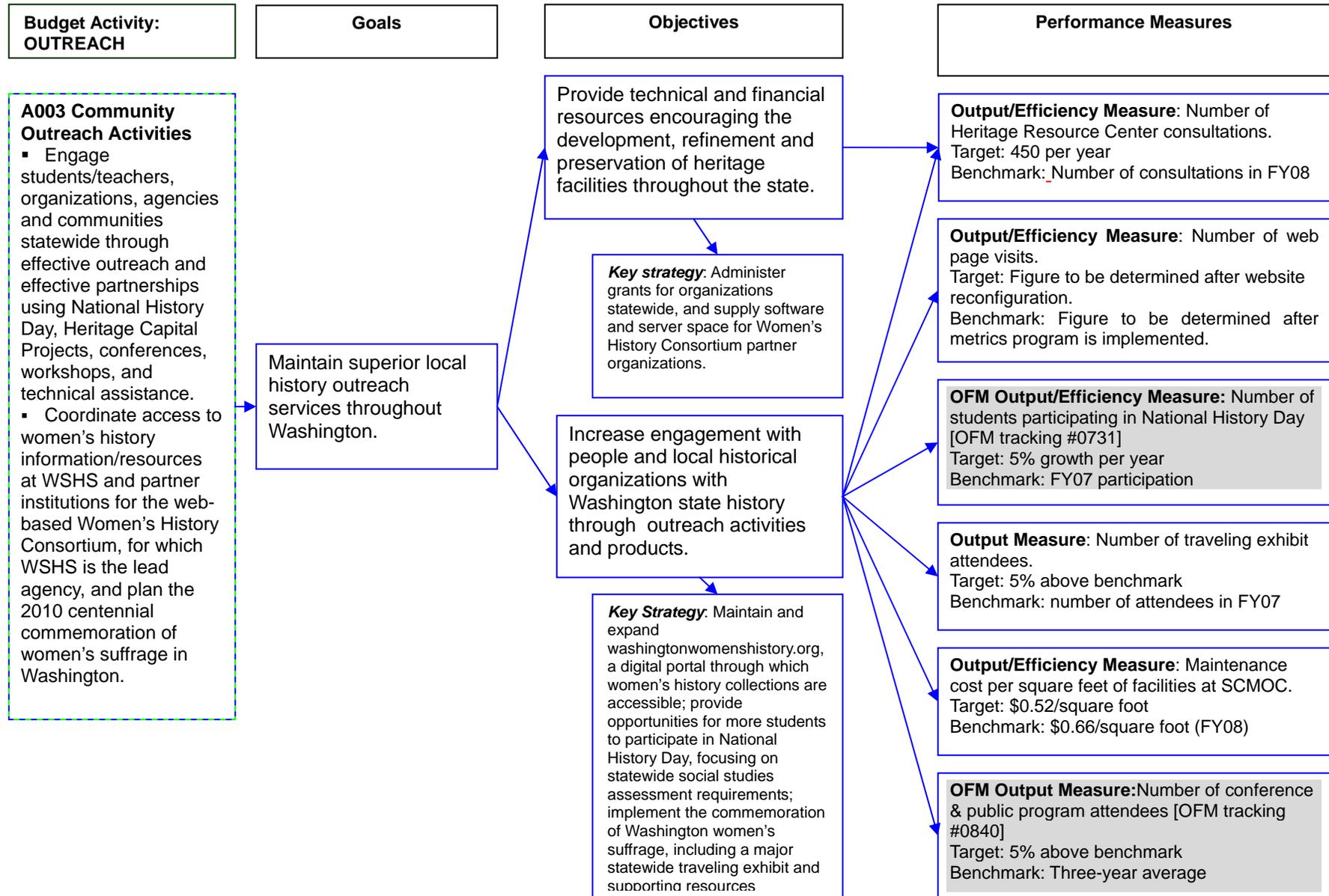
Statewide Strategy: Ensure access to cultural and recreational opportunities.



OUTREACH

Priority of Government (POG) Statewide Result Area: Improve cultural and recreational opportunities throughout the state.

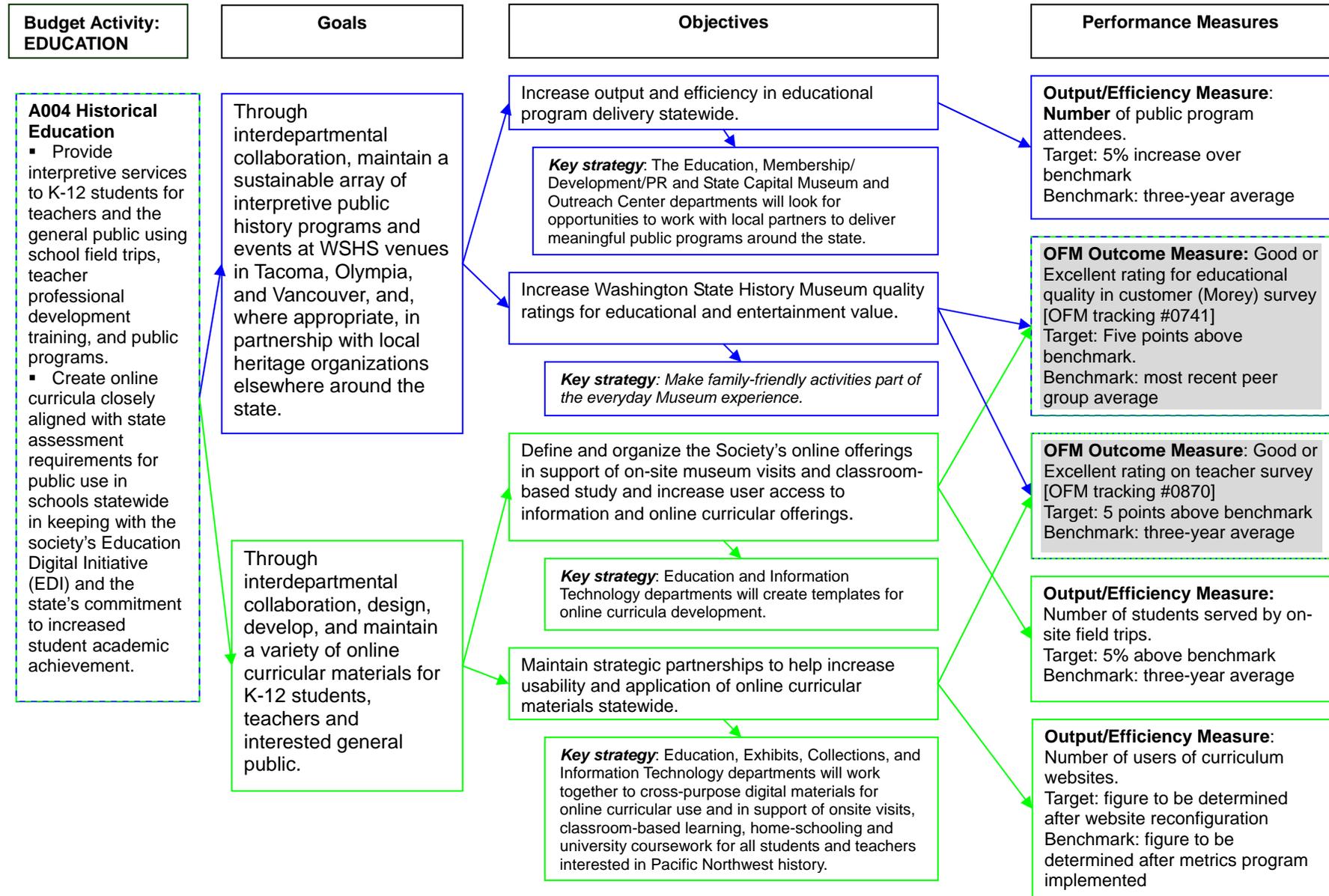
Statewide Strategy: Enhance awareness of cultural and recreational opportunities.



EDUCATION

Priority of Government (POG) Statewide Result Area: Improve cultural and recreational opportunities throughout the state.

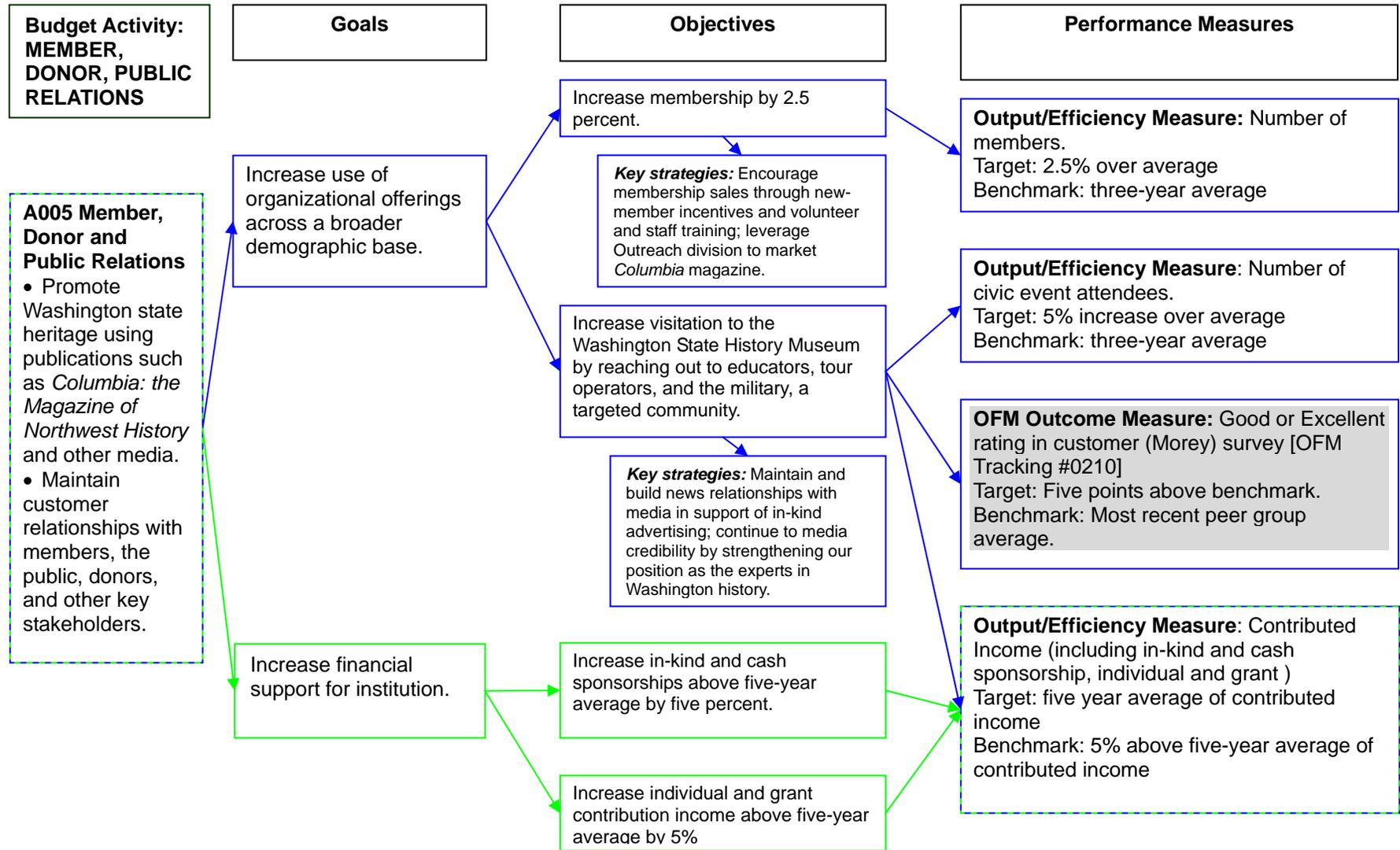
Statewide Strategy: Enhance awareness of cultural and recreational opportunities.



MEMBER, DONOR, PUBLIC RELATIONS

Priority of Government (POG) Statewide Result Area: Improve cultural and recreational opportunities throughout the state.

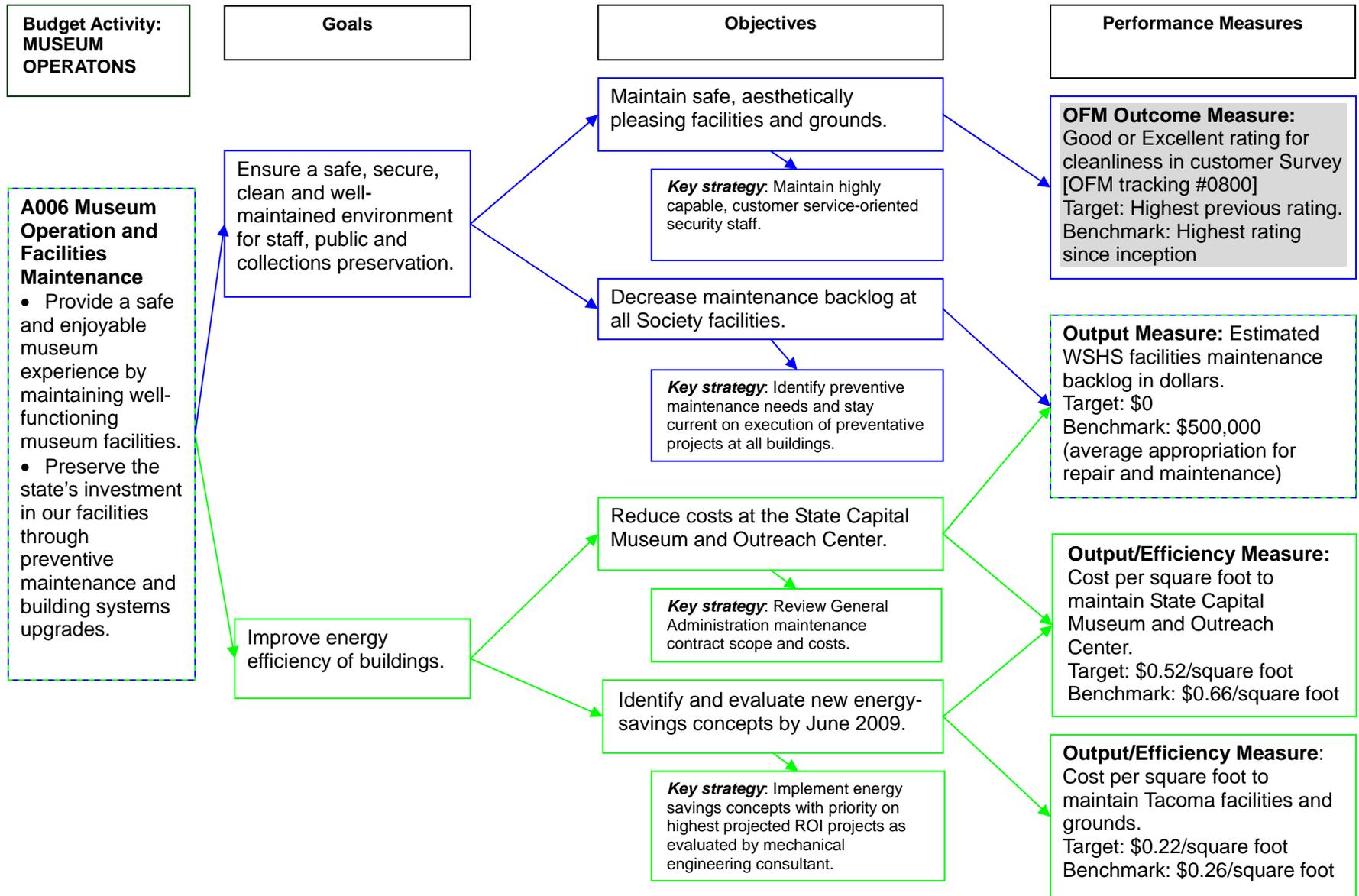
Statewide Strategy: Enhance awareness of cultural and recreational opportunities.



MUSEUM OPERATIONS

Priority of Government (POG) Statewide Result Area: Improve cultural and recreational opportunities throughout the state.

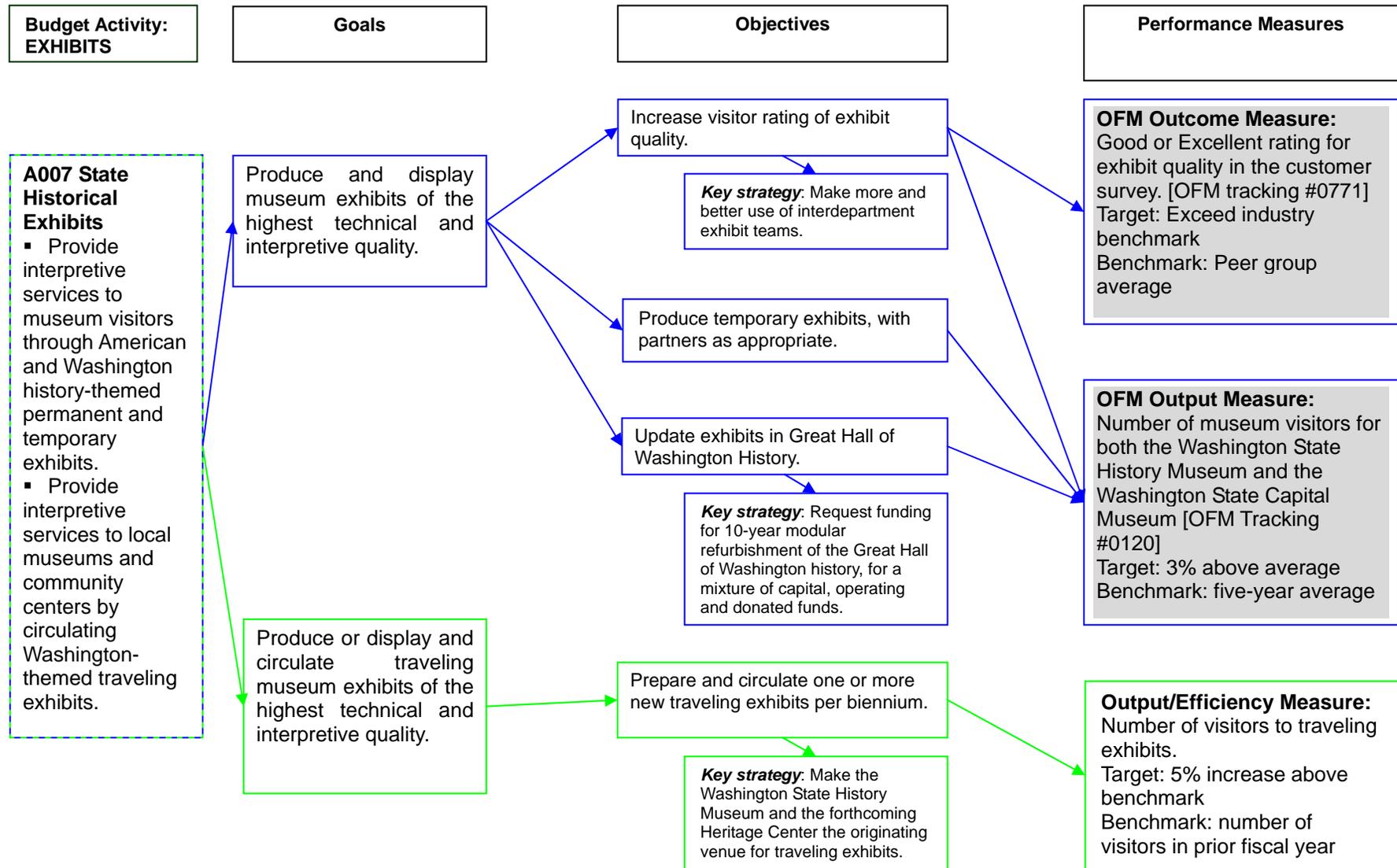
Statewide Strategy: Enhance access to cultural and recreational opportunities.



EXHIBITS

Priority of Government (POG) Statewide Result Area: Improve cultural and recreational opportunities throughout the state.

Statewide Strategy: Ensure quality cultural and recreational opportunities



Performance Assessment

In many of its key performance measures the Society has met or exceeded expectations stipulated in the previous strategic plan. This is particularly true, as a rule, relative to those measures that document the serviceability and attractiveness of the Washington State History Museum. The museum in Tacoma is unquestionably the Society's single "biggest" and perhaps most important activity as a state agency, so this is certainly not the area where state government would want to find significant gaps in performance expectation. Customer surveys and benchmark data show that the History Museum is one of the best institutions of its kind in the country.

Speaking more generally within a state government context (as opposed to an museum industry scenario), our exposure to GMAP indicated that the Society had good metrics for sick leave and overtime usage, compared to the norm, though it also became apparent that we were lagging in terms of our performance management capabilities (e.g., current position descriptions and performance evaluations). Looking forward, though not called out in our new strategic plan, it is clear that the real and prospective requirements of activity-based budgeting and

Appraisal of the 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 analysis, several strong topics and themes emerged.

(1) There is an internal tension between maximizing the earned income potential of the Society through museum admissions, membership, sales of photographic copies, use of facility space (to mention a few) and the public service dimension of our operation represented by the substantial state general fund support we receive. Nevertheless, the Society is encouraged in statute to contribute to its self-support from non-tax revenue sources and frequently earned income or donated funds are the margin for operational excellence.

(2) Although the now nearly twelve-year-old Great Hall of Washington History has a design life of 20 years, its themes were devised closer to fifteen years ago and the last 50 years of state history is

the state's new back-of-the-house roadmap are and will be a challenge for the Society because of its comparatively small size and relatively flat administrative structure.

Without question, the most significant gaps between core institutional competency and vision, versus reality, revolve around the nexus of collections management and access to collections. The Society is determined to eliminate the accountability finding on collections control and the learning curve relative to information technology and public expectations has been steep. We propose to prioritize work in the former sector using the GMAP paradigm of workforce alignment and work smarter in the latter by repurposing content across interpretive platforms (exhibits, *Columbia Magazine*, public programs, web portal). Lastly, like much of state government, we find that the aging of the baby boom generation of managers is a formidable challenge that must be managed successfully by the board and staff of the Society if the customary level of service activity is to be delivered at the traditional level of competence.

underrepresented in the hall's exhibits. To remain an attractive and edifying venue for public historical education, the work of refurbishing the hall's permanent exhibits needs to begin within the chronological parameters of this six-year plan.

(3) The new Heritage Center in Olympia will be an exciting venue in which the Society can demonstrate its exhibit development capabilities. Care must be taken, however, to ensure that this new facility does not dilute the History Museum's visibility, stature, and resource base. Creating programmatic and promotional synergies between these facilities should result in greater strength for the History Museum in Tacoma.

(4) The Society's Research Center (the old museum on Stadium Way in Tacoma) is approaching the limits of its capacity to house the collections of the institution. To provide for the continued vibrancy and relevance of the Society to future generations of Washingtonians, a commitment and

clear path to an expansion of the Research Center needs to be secured in the short term.

(5) The digital revolution shows no sign of abatement, only acceleration. The Society has made significant strides within the realm of information

Internal Capacity and Financial Health

There's no question but that the demands of running two museums, a research center, and a thematic public history office, in three separate cities, in addition to statewide service delivery systems in the field plus extensive online services such as the Women's History Consortium, has stretched the internal capacity of the Society. The entrepreneurial outlook of the Society, which has welcomed these challenges, is frequently delimited by the practical administrative demands of running the agency; demands which are clearly becoming more encompassing in their requirements in the HR field, accountability reporting, IT, and the early intimations of the new state ERP (or "Roadmap") on central service accounting. Because of the small, or "flat" administrative structure of the Society (which has only three full-time staffers who are solely "administrators"), out of necessity many business requirements are pushed to senior program staffers (like the heads of the exhibit or education departments, for example), attenuating effectiveness at that level as well.

It could well be that the new enterprise system will, in the long run, free up capacity at the program managers level and make the small administrative corps of the agency sustainable in the long run. However, even that supposition is premised on the ability of the Society to replace those three senior managers, each with an unusual combination of skill sets and who are approaching the end of their respective tenures in state government. It is for this reason that succession planning is such a salient element within this strategic plan.

Though not of concern for the short term (meaning the 2009-11 biennium), the future operational demands of the Society for the operation of the exhibits and education program in the new Heritage Center on the Capital Campus (anticipated to come online in 2011-13) suggest the need of an additional 3.0 FTE (as reflected in the Heritage

technology but maintaining that edge is critical to future success. To fulfill its statewide mission the Society should seize upon online delivery systems to provide access to its collections and to provide curricular resources for K-12 social studies instruction.

Center's business and space program plans). It is expected that the Heritage Center revenue stream will provide the Society's program staff with the other fiscal resources necessary to achieve the mission of this new facility

In financial terms, the agency seems to be in a strong position. A vigorous commitment to the maintenance of agency-owned facilities has meant that capital requests have been limited to a series of aggregated minor public works improvements of relatively modest size. The Society has had only one program-driven capital project in the last twenty years, referring to the design and construction of the History Museum in Tacoma, now 12 years old. However, the Society is rapidly approaching program capacity for the storage of collections at the Research Center in Tacoma, which will necessitate serious consideration of an expansion of that facility. This request will be outlined in greater detail in the 2009-2011 capital budget request document.

The non-state revenue streams for Society operation seem stable, and able to withstand any threats other than the catastrophic turn of events that would dislocate modern life generally. The Society budgets biennially in a conservative fashion, holding back a small percentage of forecasted non-state revenue in a reserve for unanticipated developments such as state level legal settlements (like the *Shroll* case), unemployment compensation, and the like. The Society's on-going HR strategy is to fill positions at Steps A-E to preserve capacity and limit carry-forward bow-waves. To the maximum extent possible the Society uses classified positions as opposed to WMS. Over the past 15 years, the Society has built a small endowment that can supplement general fund state resources in good times, and cushioning in bad. However, in some instances, donor intent restricts the utilities to which endowment funds can be applied.