



Office of
Financial Management
STATE OF WASHINGTON

Budget Activity Assessment

Washington State Historical Society

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Office of Financial Management Assessor:

Brian Willett
Budget Assistant to the Governor
(360) 902-0527
brian.willett@ofm.wa.gov

Agency Contact:

David Nicandri
Society Director
(253) 798-5900
dnicandri@wshs.wa.gov

Office of Financial Management Budget Analyst:

Adam Aaseby
(360) 902-0659
adam.aaseby@ofm.wa.gov

Executive Summary

It is difficult to measure the desirable outcomes of an organization like the Washington State Historical Society, because they are far removed from the actual work of the museum and somewhat unquantifiable. The agency mission statement says the museum exists to "...help residents and visitors understand the present and shape the future." The basic questions the budget activity measures need to attempt to answer for a budget/policy development audience are:

- Is attendance in the major museum programs and increasing, decreasing, or staying the same?
- Are the private fund raising activities generating more, less, or about the same amount of charitable contributions?
- Is the museum efficiently using its allocated resources to manage/protect facilities and collections while increasing access?

In order to focus attention on these primary issues, the museum should consider placing a number of measures it currently submits to the Office of Financial Management (OFM) into inactive status.

Specifically, the current measures for accreditation, education modules produced, and the results of the customer surveys are more relevant to internal management audiences. The associated budget activities would then need to be linked to the existing, more relevant measures related to attendance or access.

The measurement topic that is missing from the budget activity inventory is the amount of funding raised by the museum. The museum should develop a new performance measure with the help of its OFM Budget Analyst and link it to the appropriate budget activity.

Many of the existing measures lack enough data for context or analysis. Where possible, the museum should go through its records and "backload" historical data from 2003-05 and 2005-07 into the Performance Measure Tracking System (PMT).

From a technical standpoint, the agency should consider the recommendations and questions raised by this assessment pertaining to the use of cumulative data and the reasoning behind setting some of its performance targets.

Budget Activity Measure Qualitative Evaluation Summary

Budget Activity Number & Title	Evaluation Criteria						
	Relevance	Understandability	Comparability	Timeliness	Consistency	Reliability	Performance
A001 – Acquire and Maintain Historic Collection	Meets or Exceeds OFM Expectations	Marginally meets OFM Expectations	Marginally meets OFM Expectations				
A002 – Agency Administration	Needs Improvement to Meet OFM Expectations	Marginally meets OFM Expectations					
A003 – Community Outreach Activities	Marginally meets OFM Expectations	Meets or Exceeds OFM Expectations	Marginally meets OFM Expectations	Needs Improvement to Meet OFM Expectations	Needs Improvement to Meet OFM Expectations	Marginally meets OFM Expectations	Meets or Exceeds OFM Expectations
A004 – Historical Education	Needs Improvement to Meet OFM Expectations	Meets or Exceeds OFM Expectations	Meets or Exceeds OFM Expectations	Needs Improvement to Meet OFM Expectations	Needs Improvement to Meet OFM Expectations	Meets or Exceeds OFM Expectations	Meets or Exceeds OFM Expectations
A005 – Member, Donor and Public Relations	Needs Improvement to Meet OFM Expectations	Meets or Exceeds OFM Expectations	Meets or Exceeds OFM Expectations	Needs Improvement to Meet OFM Expectations	Needs Improvement to Meet OFM Expectations	Needs Improvement to Meet OFM Expectations	Meets or Exceeds OFM Expectations
A006 – Museum Operations and Facilities Maintenance	Needs Improvement to Meet OFM Expectations	Meets or Exceeds OFM Expectations	Meets or Exceeds OFM Expectations	Needs Improvement to Meet OFM Expectations	Needs Improvement to Meet OFM Expectations	Meets or Exceeds OFM Expectations	Meets or Exceeds OFM Expectations
A007 – State Historical Exhibits	Marginally meets OFM Expectations	Meets or Exceeds OFM Expectations	Meets or Exceeds OFM Expectations	Marginally meets OFM Expectations	Marginally meets OFM Expectations	Meets or Exceeds OFM Expectations	Marginally meets OFM Expectations

Meets or Exceeds OFM Expectations

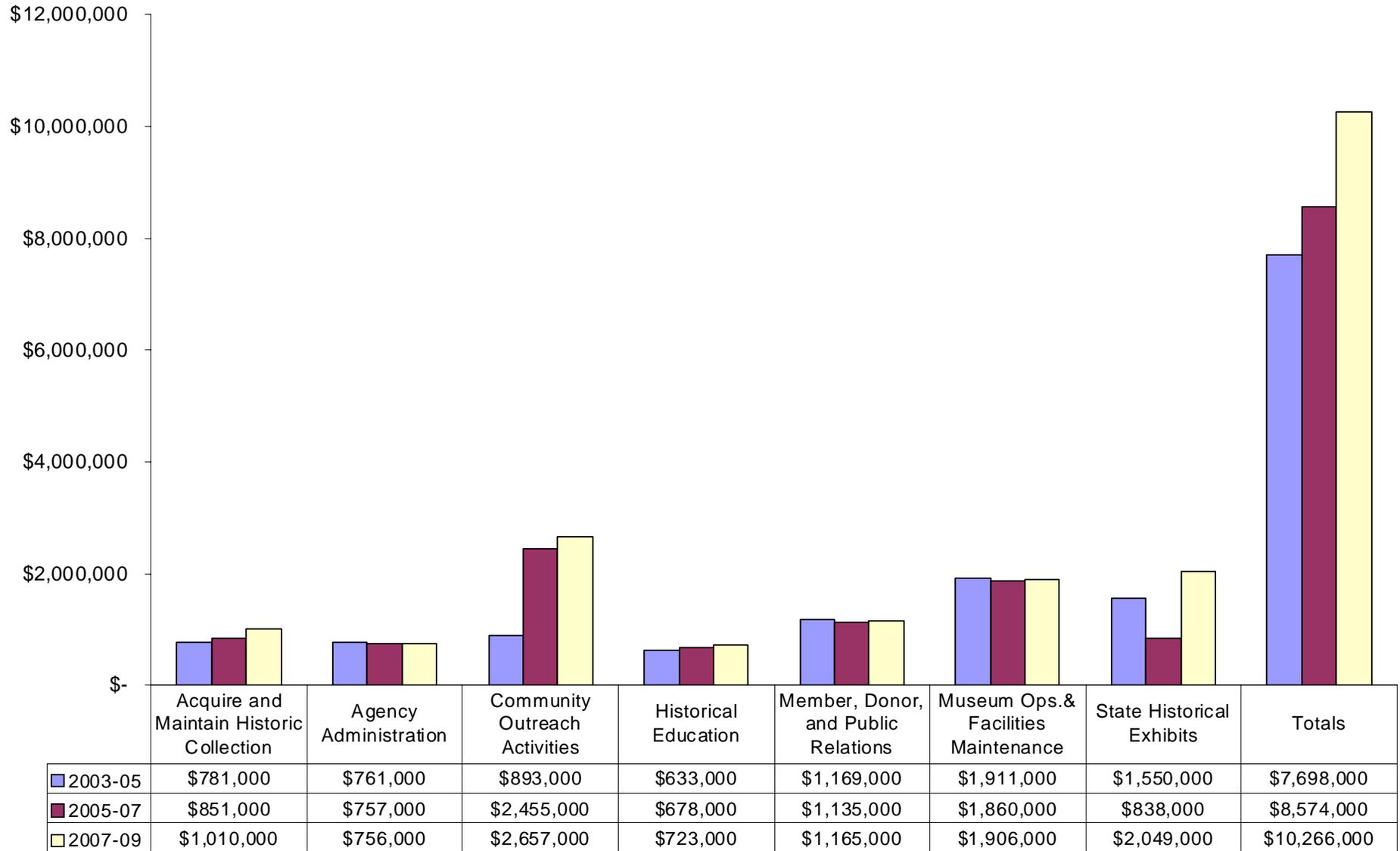
Marginally meets OFM Expectations

Needs Improvement to Meet OFM Expectations

Evaluation Criteria Definitions	
Relevance	Useful to a budget/policy development audience in assessing the level of accomplishment
Understandability	Clear, concise, and easy for a non-expert to understand
Comparability	Do the data, targets, and footnotes provide the reader with enough context to tell whether performance is getting better, worse, or staying the same?
Timeliness	Is the data current and reported frequently enough to be of value in assessing accountability and making decisions?
Consistency	Is the data collection method standardized and is the operational definition for data calculations adhered to?
Reliability	Is the information verifiable, free from bias, and a faithful representation of what it purports to represent?
Performance	Is actual performance in reference to the stated targets getting better, worse, or staying the same over time?

Budget History by Activity

Washington State Historical Society Total Allocations (2003-05 to 2007-09)



Agency Comments and Reactions

WSHS appreciates the opportunity to work with OFM to make our performance measures applicable in both a budget/policy context and within the world of museums and historical societies. Per our discussions with OFM, we propose the following:

We will work with OFM to delete the following measures: 0420, 0410, 0870 and 0741. The first three are unnecessary, as they were written to support a decision package; the last is not relevant to a budget/policy audience.

We will work with OFM to modify the following measure titles: 0806, 0721 and 0120. We concur that 0806 should be changed to “Number of collection items digitized per quarter” to provide more transparency and internal ability to respond to variation. We suggest changing 0721 to “Storage capacity necessary to maintain accreditation from the American Association of Museums,” because accreditation alone is not a useful measure. The change will show whether WSHS objectives meet national accreditation standards. Finally, we propose to modify the target to “maintain benchmark,” which better reflects performance in the context of museums nationally. We will explicate this change in the appropriate footnote.

OFM suggested that historical data would make several measures more relevant, and WSHS agrees. We will backload historical data for 0800, 0210, 0771, and 0430. The first three relate to the customer service survey WSHS conducts annually; we have data for the previous two biennia. The final measure is the number of visitors to traveling exhibits, and we have data going back to 2003.

Specific Opportunities for Improvement

Budget Activity Number and Title	Measures	Improvement Suggestions
A001 – Acquire and Maintain Historic Collection	0806 – Cumulative number of collection items digitized 0310 – Percent of artifact collection inventoried	Both of the current measures report cumulated data, which tends to hide variation patterns and make it difficult to see when something is changing that needs management attention. The agency should consider changing how this data is reported to OFM.
A002 – Agency Administration	0721 – Maintain accreditation from the American Association of Museums	The measure, “Maintain accreditation from the American Association of Museums”... 1.) Is not written as a performance measure. 2.) Is only updated once per year, and only has two actual data points in PMT. 3.) The targets are 100% and all the actual data is 100%. This measure should be placed into inactive status in the Performance Measure Tracking System (PMT).
A003 – Community Outreach Activities	0840 – Number of conference and public program attendees 0420 – Number of local commemoration events produced 0410 – Number of on-line education modules produced 0730 – Number of students participating in National History Day 0430 – Number of traveling exhibit attendees	<p>The footnote in measure 0840 says that the number of attendees includes individuals attending statewide traveling exhibits, which data is also reported in measure 0430 – The Number of traveling exhibit attendees. There is no apparent reason to report this data twice, and it appears to be a possible source of the wild fluctuations in the counts in measure 0840.</p> <p>The measures, 0420 – Number of local commemoration events produced and 0410 - Number of on-line education curriculum models produced, are output counts and are not very relevant subjects for a budget/policy development audience. They should be placed into inactive status in PMT.</p> <p>Measure 0730 – Number of students Participating in National History Day, is confusing because it switches from an annual to a quarterly reporting cycle, and the new quarterly measurements are significantly larger than the previous annual numbers. How many National History Days are there in any given year?</p> <p>The number of participants in National History Day and the number of traveling exhibit attendees are the most relevant types of outcomes measures, but they lack enough historical data to tell a compelling performance story. If possible, historical data should be back-loaded into PMT to provide more context.</p>

Specific Opportunities for Improvement (cont.)

Budget Activity Number and Title	Measures	Improvement Suggestions
A004 – Historical Education	<p>0741 – Good or Excellent rating for educational quality in the customer (Morey) survey</p> <p>0210 – Good or Excellent rating for overall experience in the customer (Morey) survey</p> <p>0870 – Good or Excellent rating in the teacher survey</p> <p>0410 – Number of on-line education curriculum modules produced</p>	<p>Place all the Morey and teacher survey measures into inactive status in PMT. Do the same for the number of on-line education curriculum modules produced. Nether of these measurement subjects are very relevant to a budget/policy development audience.</p> <p>There is a measure in the PMT that is not currently published relating to the number of students served by on-site classes that could serve as a very relevant measure of the performance of this activity.</p>
A005 – Member, Donor and Public Relations	<p>0210 – Good or Excellent rating for overall experience in the customer (Morey) survey</p>	<p>All the measures relating to the Morey survey elements should be placed into inactive status.</p> <p>A more relevant measure would be the amount of income generated by contributions, which is currently tracked as part of the agency strategic plan and is regularly reviewed in internal Government Management and Accountability (GMAP) meetings.</p>
A006 – Museum Operations and Facilities Maintenance	<p>0800 – Good or Excellent rating for facility cleanliness in the customer (Morey) survey</p>	<p>The measures relating to the Morey survey elements should be placed into inactive status.</p> <p>A new, more relevant, measure should be developed or brought in from the strategic plan that relates to the desirable immediate outcomes of the museum. Clean, well operated facilities should increase visitor satisfaction, which should increase referrals, attendance, community support, and charitable contributions, etc.</p>

Specific Opportunities for Improvement (cont.)

Budget Activity Number and Title	Measures	Improvement Suggestions
A007 – State Historical Exhibits	<p>0771 – Good or Excellent ratings for exhibit quality in the customer (Morey) survey</p> <p>0210 – Good or Excellent ratings for overall experience in the customer (Morey) survey</p> <p>0120 – Number of museum visitors for both the Washington State History Museum and the Washington State Capital Museum</p> <p>0430 – Number of traveling exhibit attendees</p>	<p>The measures relating to the Morey survey elements should be placed into inactive status.</p> <p>The measure relating to the number of traveling exhibit attendees is a relevant subject, but the lack of data limits the ability of the measure to tell a compelling story. If possible, historical data should be back-loaded into PMT at least from the 2005-07 biennium. Also, a footnote should be added to account for the reason the targets are jumping from 2,100 to 7,500 per quarter.</p> <p>With measure # 0120 relating to the number of visitors to the Washington State History Museum and the Capital Museum, the targets appear to be estimates. It would be better to set the targets, ignoring the quarterly variation, and focusing on whether the agency wants attendance to increase, decrease, or stay about the same. The current data patterns indicate that attendance is stable and not increasing or decreasing. Any increasing targets should also include an explanation of what will change to actually increase attendance over time.</p>

Budget Activity and Measure Critique

Budget Activity Number & Title: A001 – Acquire and Maintain Historic Collection

Summary of Expected Results: Create digital images of collection items; inventory artifacts; catalog artifacts, photographs, books, items of ephemera, and maps; process boxed manuscript material; and answer public inquiries

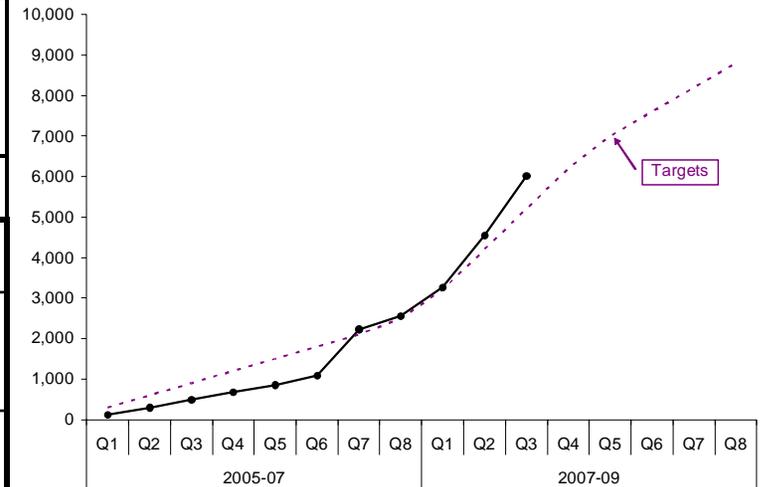
Related Performance Measures

Number & Title	Type	Analysis Comments
0806 – Cumulative number of collection items digitized	Output	The number of items digitized per quarter appears to be increasing, and the project is ahead of schedule.
0310 – Percent of artifact collection inventoried	Process	The project is falling behind schedule because the increase in the amount of the collection is staying relatively flat at less than 1%. In order to stay on target, the rate of increase would need to average about 5% per quarter.

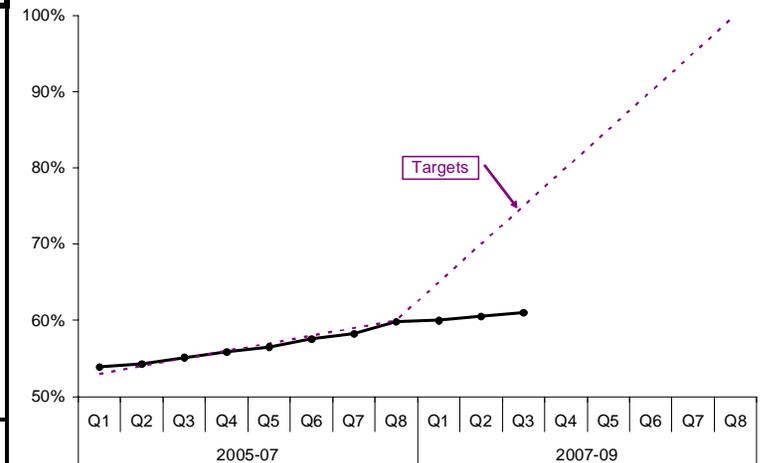
OFM Assessor Comments: Cumulating data by adding the most recent data to the previous total hides variation patterns critical to management and in general should be avoided where possible. When the data for these two charts is not cumulated (See following slide), information is learned that is not readily apparent on the current charts. On measure #0806, a stable increasing trend is evident, but there is a large spike and resultant fall off in digitization in the 7th & 8th quarters of 2005-07 that should be explained from a management point of view. In measure #0310, there is a significant drop in the rate of artifact inventorying that should be explained, but is hidden when the data is cumulated.

Agency Contextual Comments: More staff resources have been allocated to the task of digitizing collection items in response to a State Auditor finding. The museum proposes to change 0806 to the “Number of collection items digitized per quarter” to make variation more transparent.

0806 - Cumulative number of collection items digitized



0310 - Percent of the artifact collection inventoried (Cumulative)



Budget Activity and Measure Critique

Budget Activity Number & Title: A002 – Agency Administration			Performance Measure Charts No chart needed. Target = 100% All actual data = 100%
Summary of Expected Results: Expansion of Fort Clatsop Memorial, upgrade computers, distribute pass-through funding, implement and administer policies and procedures			
Related Performance Measures			
Number & Title	Type	Analysis Comments	
0721 - Maintain accreditation from the American Association of Museums	Not a performance measure	The title should read "Accreditation requirement compliance rate"	
OFM Assessor Comments: As written, this is not really even a performance measure, nor is it all that compelling a story. This measure could be placed into inactive status.			
Agency Contextual Comments: WSHS proposes to modify this measure to read "Storage capacity necessary to maintain accreditation from the American Association of Museums," and move it to the Collections budget activity.			

Budget Activity and Measure Critique

Budget Activity Number & Title: A003 – Community Outreach Activities

Summary of Expected Results: Support 25-30 heritage capital projects through disbursement of \$4 to \$5 million in grants, contribute to a higher level of expertise of heritage professionals and volunteers, enhance traveling exhibit offerings, fund speakers, operate the State Capital Museum

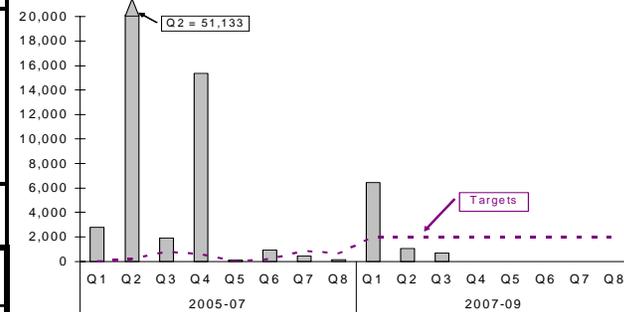
Related Performance Measures

Number & Title	Type	Analysis Comments
0840 - Number of conference and public program attendees	Input	Unstable and unpredictable – What causes the abnormally large spikes?
0420 - Number of local commemoration events produced	Process	Not enough data for any analysis
0410 - Number of on-line education modules produced	Process	Target = 1 and actual data = 1
0730 - Number of students participating in National History Day	Input	Not enough data for any analysis – Why switch measure to quarterly reporting if National History Day happens once a year?
0430 - Number of traveling exhibit attendees	Input	Why are the targets increasing so dramatically?

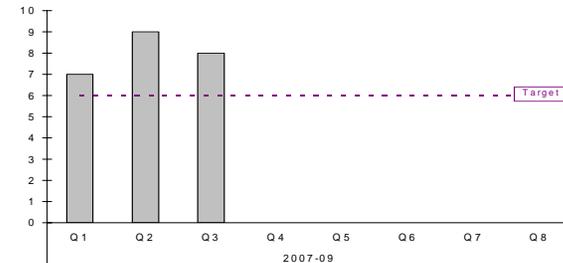
OFM Assessor Comments: The output measures for the number of commemoration events produced and on-line education modules produced are not compelling at a budget/policy development level, and should be placed into inactive status. The lack of data in the measures for National History Day and attendance at traveling exhibits hinders their ability to tell a compelling story.

Agency Contextual Comments: The Lewis and Clark Bicentennial commemorative events attendance caused the abnormal spike in 0840; WSHS will footnote this data. The increasing targets in 0430 represent expected attendance for the upcoming exhibit commemorating the centennial of Washington women’s suffrage, which will travel to major venues across the state.

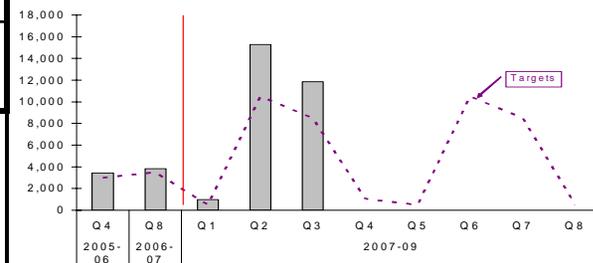
0840 - Number of conference and public program attendees



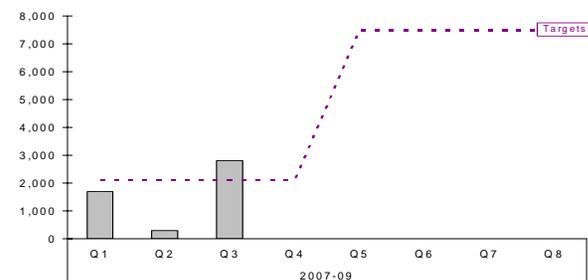
0420 - Number of local commemoration events produced



0730 - Number of students participating in National History Day



0430 - Number of traveling exhibit attendees



Budget Activity and Measure Critique

Budget Activity Number & Title: A004 – Historical Education

Summary of Expected Results: Improved learning for students studying Washington State history, academically solid resource material for teachers, professional development for teachers, increased accessibility to state heritage resources, increased visitation to educational programs

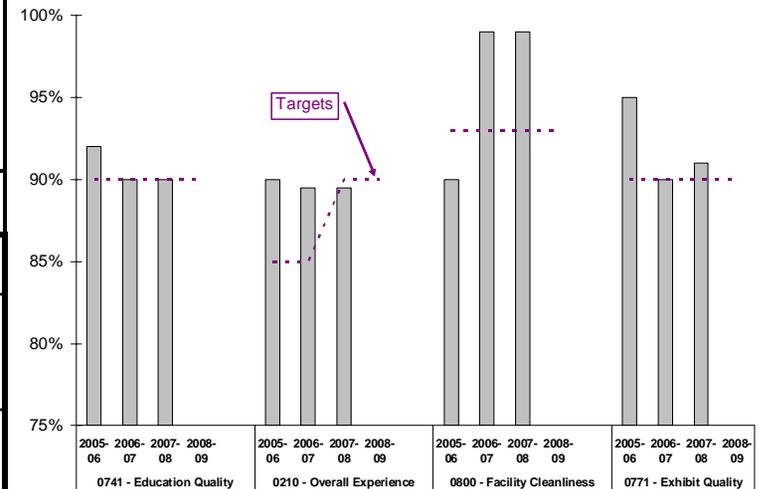
Related Performance Measures

Number & Title	Type	Analysis Comments
0741 – Good or Excellent rating for educational quality in the customer (Morey) survey	Process	Not enough data for any analysis, but for the most part it appears survey targets have been met or exceeded.
0210 – Good or Excellent rating for overall experience in the customer (Morey) survey	Process	Not enough data for any analysis, but for the most part it appears survey targets have been met or exceeded.
0870 - Good or Excellent rating in the teacher survey	Process	Not enough data for any analysis. Targets have been met in one of the two years reported.
0410 – Number of on-line education curriculum modules produced	Process	Target = 1, Actual Data = 1

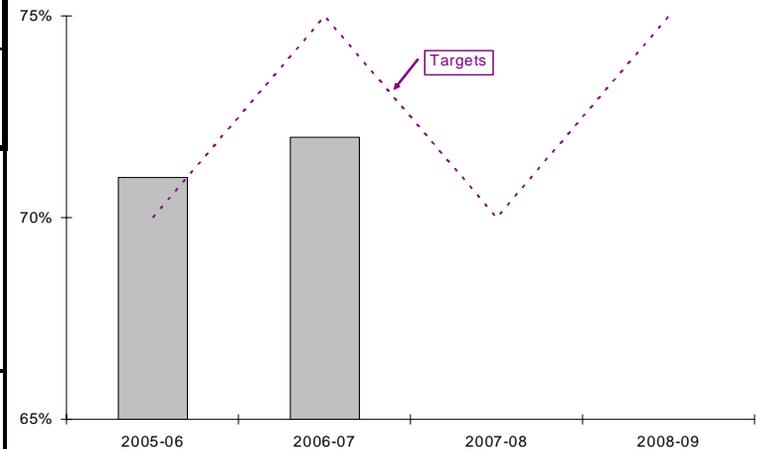
OFM Assessor Comments: Annual survey results are not very compelling to external audiences. The measures relating to the Morey survey elements and the teacher survey should be placed into inactive status. The unpublished measure about the number of students served by on-site classes is the most relevant measure for this budget activity.

Agency Contextual Comments: WSHS appreciates OFM bringing to our attention that the measure for the number of students served by on-site classes was not selected for publishing in PMT; we will be publishing this data. We concur that 0741, 0870 and 0410 are not relevant to external audiences. WSHS will backload historical data for 0210 and will add a footnote explaining the national context within which survey results should be interpreted.

Good or Excellent rating in the customer (Morey) survey



Good or Excellent rating in teacher survey



Budget Activity and Measure Critique

Budget Activity Number & Title: A005 - Member, Donor and Public Relations

Summary of Expected Results: Increased recollection of museum advertising; increased attendance; increased membership dues and contributed revenue

Related Performance Measures

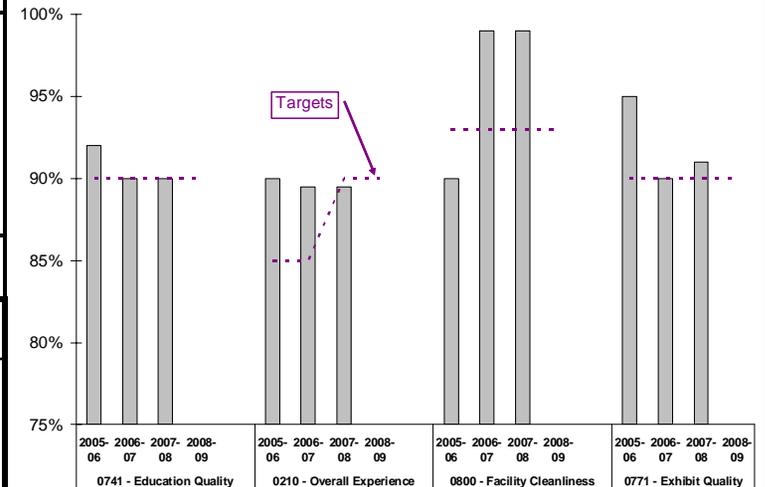
Number & Title	Type	Analysis Comments
0210 – Good or Excellent rating for overall experience in the customer (Morey) survey	Process	Not enough data for any analysis, but for the most part it appears survey targets have been met or exceeded.

OFM Assessor Comments: Annual survey results are not very compelling to external audiences. The measures relating to the Morey survey elements should be placed into inactive status. A more relevant measure would be the amount of income generated by contributions, which is currently tracked as part of the agency strategic plan and is regularly reviewed in internal Government Management and Accountability (GMAP) meetings.

Agency Contextual Comments: WSHS will backload customer survey results from the prior two biennia to add depth to this measure. The annual survey is conducted within the context of peer institutions, including Space Center Houston and the San Diego Zoo. WSHS’s survey results should be understood as our ranking compared to the nation’s best museums.

We propose to convert an internal measure, “Non-state income (including in-kind and cash sponsorships, individual giving and grants)” to an OFM tracking measure.

Good or Excellent rating in the customer (Morey) survey



Budget Activity and Measure Critique

Budget Activity Number & Title: A006 – Museum Operation and Facilities Maintenance

Summary of Expected Results: Score above the benchmark average for facility cleanliness and staff courtesy when compared with peer institutions.

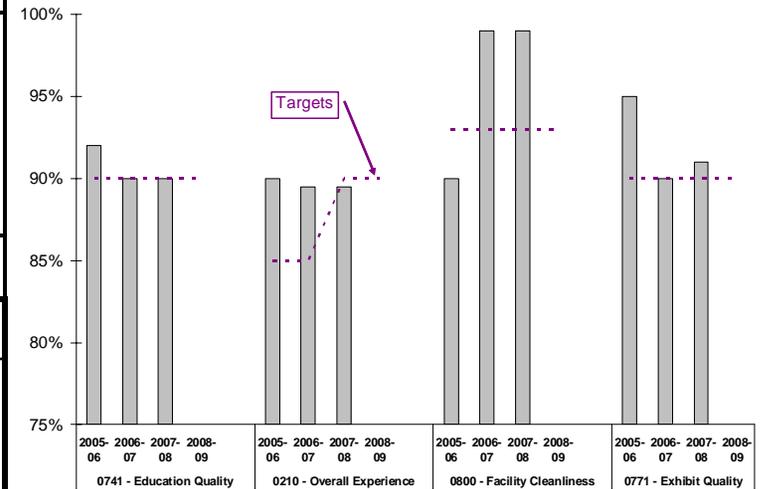
Related Performance Measures

Number & Title	Type	Analysis Comments
0800 – Good or Excellent rating for facility cleanliness in the customer (Morey) survey	Process	Not enough data for any analysis, but for the most part it appears survey targets have been met or exceeded.

OFM Assessor Comments: Annual survey results are not very compelling to external audiences. The measures relating to the Morey survey elements should be placed into inactive status. Clean, well operated facilities should increase visitor satisfaction, which should increase referrals, attendance, community support, and charitable contributions.

Agency Contextual Comments: WSHS will backload two biennia of historical survey data. Rankings on the survey should be understood in the context of WSHS's peer institutions nationwide, including Mystic Seaport and the New York Botanical Garden.

Good or Excellent rating in the customer (Morey) survey



Budget Activity and Measure Critique

Budget Activity Number & Title: A007 – State Historical Exhibits

Summary of Expected Results: Maintain satisfaction levels above benchmark institutions on visitor surveys; assess exhibit space at the State Capital Museum and plan for its expansion; monitor exhibit outcomes through formal and informal surveys, comment books, and docent and staff observations.

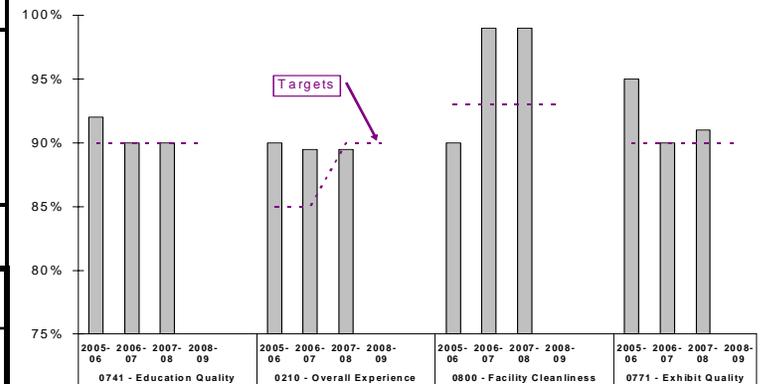
Related Performance Measures

Number & Title	Type	Analysis Comments
0771 – Good or Excellent ratings for exhibit quality in the customer (Morey) survey	Process	Not enough data for any analysis, but for the most part it appears survey targets have been met or exceeded.
0210 - Good or Excellent ratings for overall experience in the customer (Morey) survey	Process	Not enough data for any analysis, but for the most part it appears survey targets have been met or exceeded.
0120 – Number of museum visitors for both the Washington State History Museum and the Washington State Capital Museum	Input	Stable and predictable – Nothing is changing – Future results should be similar to current performance levels. The targets appear to be estimates.
0430 – Number of traveling exhibit attendees	Input	Why are the targets increasing so dramatically?

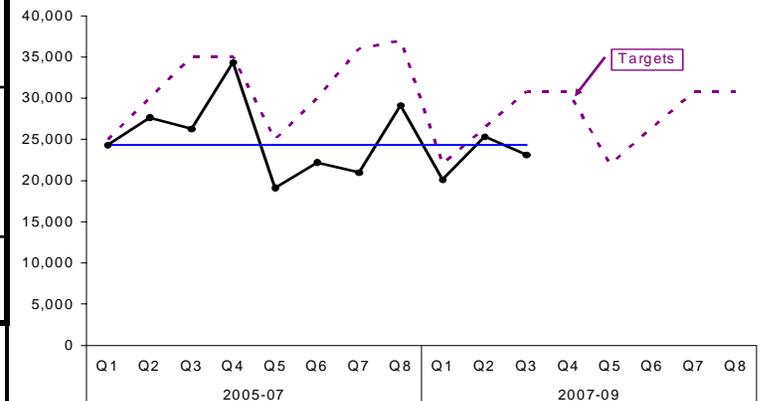
OFM Assessor Comments: Annual survey results are not very compelling to external audiences. The measures relating to the Morey survey elements should be placed into inactive status. The number of visitors appear to be stable and predictable. The current estimates should be replaced with targets that reflect economic conditions, strategic intent, and resource allocation to tell a clear picture of what better looks like (increasing, decreasing, or staying the same).

Agency Contextual Comments: Targets for 0430 reflect the anticipated attendance at the major exhibit commemorating the centennial of Washington women's suffrage. Historical customer survey data will be back loaded and footnoted to explain its relevance in the national context of peer institutions, including the San Francisco Museum of Modern Art and the Bronx Zoo.

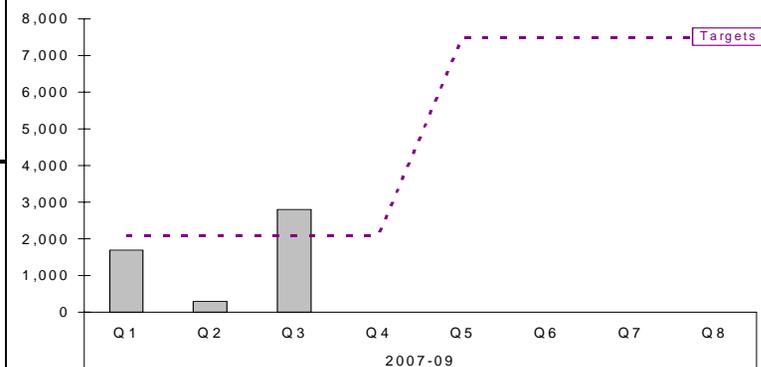
Good or Excellent rating in the customer (Morey) survey



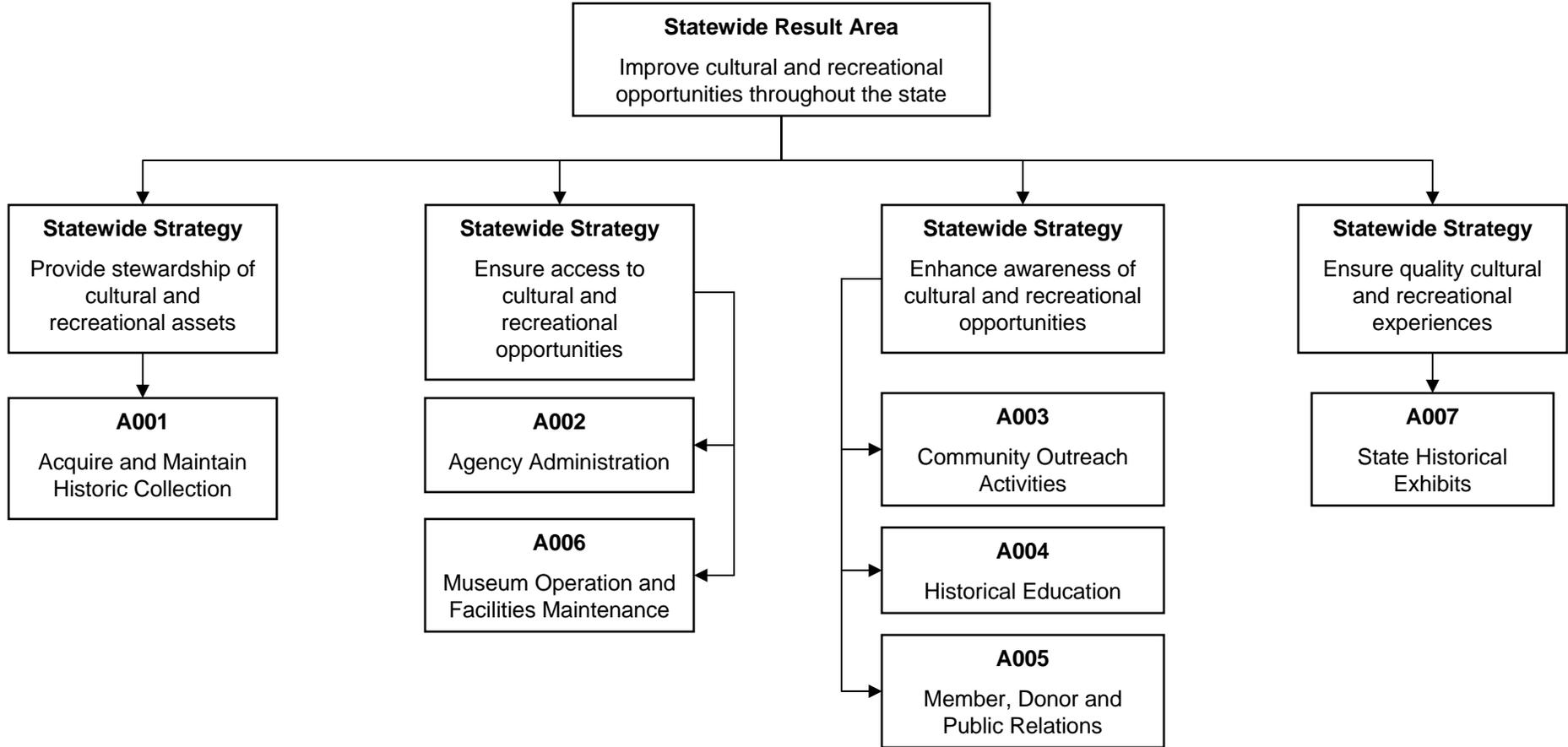
0120 - Number of museum visitors for both the Washington State History Museum and the Washington State Capital Museum



0430 - Number of traveling exhibit attendees

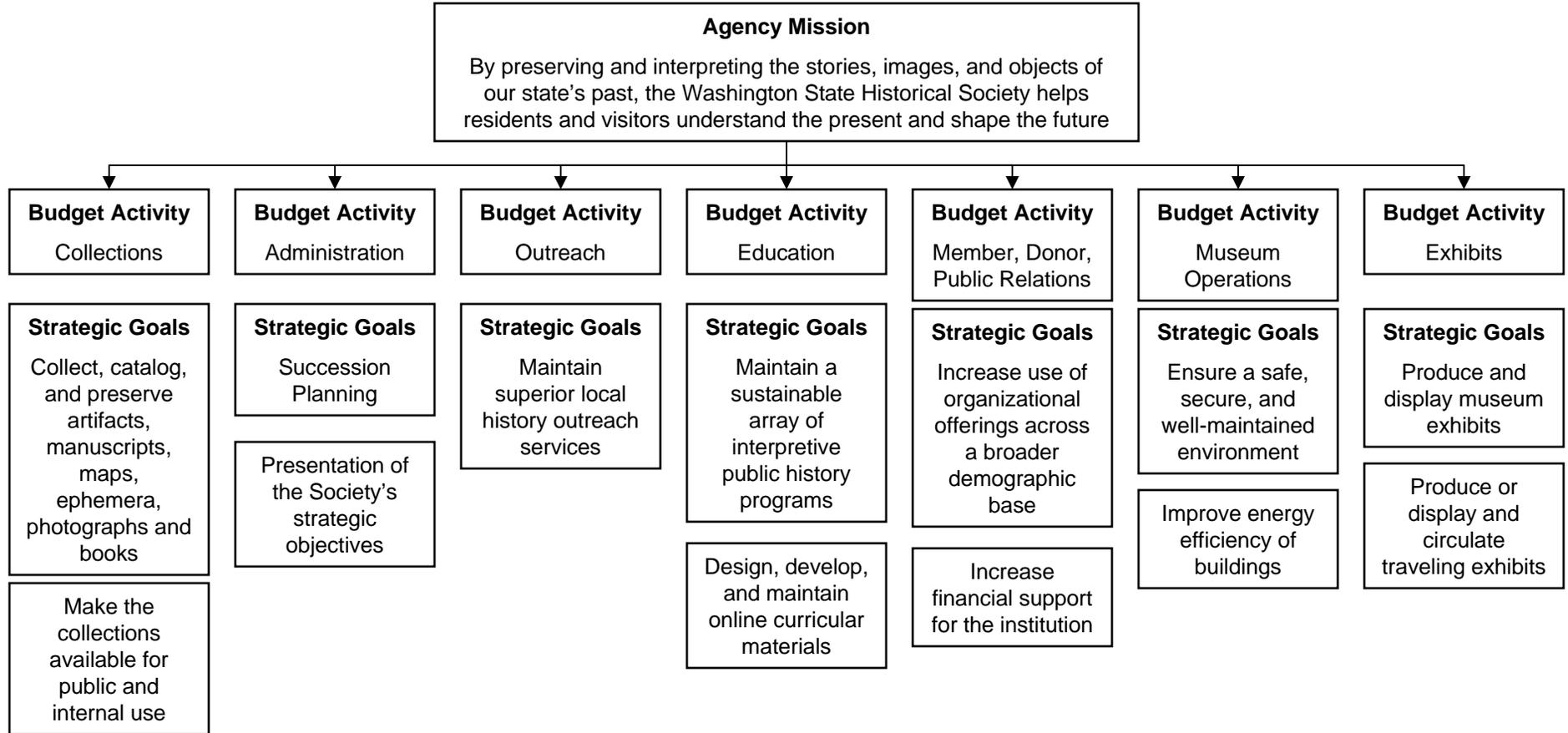


Alignment Overview – Budget Activity Structure



Input/Workload Measures	Process/Efficiency Measures	Output Measures	Outcome Measures
0840-Number of conference and public program attendees 0730-Number of students participating in National History Day 0430-Number of traveling exhibit attendees 0120-Number of museum visitors for both the Washington State History Museum and the Washington State Capital Museum	0310-Percent of artifact collection inventoried 0420-Number of local commemoration events produced 0410-Number of on-line education modules produced 0741, 0210, 0800, 0771-Customer (Morey) survey results 0870-Teacher survey results	0806-Cumulative number of collection items digitized	None Note- Maintain accreditation from the American Association of Museums is not a performance measure.

Alignment Overview – Agency Strategic Plan Structure



Input/Workload Measures	Process/Efficiency Measures	Output Measures	Outcome Measures
<ul style="list-style-type: none"> • Number of web page visits • Number of public program attendees • Number of students served by on-site field trips • Number of users of curriculum websites • Number of civic event attendees • Estimated WSHS facilities maintenance backlog in dollars 	<ul style="list-style-type: none"> • Percent of storage capacity available within existing Research Center footprint • Percent of data needing normalization after conversion • Number of days to fill a position vacancy • Maintenance cost per square foot of facilities at SCMOC • Cost per square foot to maintain State Capital Museum and Outreach Center • Cost per square foot to maintain Tacoma facilities and grounds 	<ul style="list-style-type: none"> • Percent of position descriptions and Performance Development Plans completed • Number of Heritage Resource Center consultations 	<ul style="list-style-type: none"> • Number of members • Contributed income (Including in-kind and cash sponsorship, individuals and grants)