Washington State Historical Society

STRATEGIC PLAN

2017-2020
# TABLE OF CONTENTS

BACKGROUND........................................................................................................................................... 3
A New Approach to Strategic Planning ........................................................................................................... 3
Process........................................................................................................................................................... 4
  Current Geographic Area ............................................................................................................................... 5
  Current Programs/Services ............................................................................................................................ 5
  Current Customers ......................................................................................................................................... 6
  Current Funding ........................................................................................................................................... 7
Direct/Substitutable Competitors....................................................................................................................... 8
Resource Competitors........................................................................................................................................ 8
  WSHS Competitive Advantages..................................................................................................................... 9
Societal Trends ................................................................................................................................................ 10
Local Trends .................................................................................................................................................... 10
WSHS Trends ................................................................................................................................................ 10
Our Strategy Screen....................................................................................................................................... 11
Our Big Questions .......................................................................................................................................... 11
Long Term Objectives.................................................................................................................................... 11
Strategic Goals................................................................................................................................................ 12
WSHS STRATEGIC PLAN

BACKGROUND

The Washington State Historical Society was founded in 1891 and soon after, in 1903, became a trustee agency of the State of Washington. Based in Tacoma, the Society has two facilities: the Washington State History Museum and the Washington State History Research Center. The Society’s authorized activities are provided in the Revised Code of Washington and include:

- To collect, catalog, preserve, and interpret objects, manuscripts, sites, photographs, and other materials illustrative of the cultural, artistic, and natural history of this state;
- To operate state museums and assist and encourage cultural and historical studies and museum interpretive efforts throughout the state, including those sponsored by local historical organizations, and city, county, and state agencies;
- To engage in cultural, artistic, and educational activities, including classes, exhibits, seminars, workshops, and conferences if these activities are related to the basic purpose of the society;
- To plan for and conduct celebrations of significant events in the history of the state of Washington and to give assistance to and coordinate with state agencies, local governments, and local historical organizations in planning and conducting celebrations.

This guidance undergirds the institutional direction of the Society across time and ensures a continuity of service to the citizens of Washington State. Programmatic direction shifts across time, however, with some decades showing an emphasis on scholarly publications, or historical highway markers, and others on commemoration of significant events such as the Lewis and Clark Bicentennial. Organizational goals and strategies employed to reach those goals have shifted across time as well, in response to changing business environments, shifting audience demographics, funding fluctuations, and societal factors.

A NEW APPROACH TO STRATEGIC PLANNING

Organizational strategic plans traditionally serve to mark a period of time where organizational goals are fixed, and progress against such goals is measured. The Society’s last formal strategic plan covered the fiscal years of 2013-2017. Goals were developed, along with strategies, tactics, and timelines for achievement.
In developing the current strategic plan, the Society has embraced the real-time strategic planning approach laid out by nonprofit management consultant David La Piana. This process rejects the rigidity and static nature of traditional strategic plans, which often end up sitting on a shelf untouched shortly after their development. The real-time strategic planning approach recognizes the fast-paced nature of the non-profit world, and the need for organizations to be strategic and responsive to changing conditions in order to ensure long term success. For more information about this approach, please see “The Nonprofit Strategy Revolution: Real time strategic planning in a rapid response world,” by David La Piana.

**PROCESS**

Our strategic planning process began in early 2016 with a series of board development workshops led by nonprofit consultant Susan Howlett. Susan led the board of trustees through a series of discussions and exercises across three board meetings designed to define trustee/staff roles, explore best practices in board governance, and ways to grow board engagement. This board engagement process then led into our first workshop focused on revising the Society's mission and vision. Society director Jennifer Kilmer conducted a follow-up workshop. Society staff then held three strategic planning workshops using the Real Time Strategic Planning approach to inform the development of our Big Questions (strategic goals/challenges), the activities we plan to undertake to achieve those goals, and the strategy screen through which future activities will be analyzed. These workshops were all informed by data derived from outcomes of the prior strategic plan, audience survey results garnered through the biennial Morey Survey, biennial member surveys, input from our Community Advisory Committee, and staff input.

After development of our strategic goals and activities, departmental managers met with their teams to develop the short-term tactics needed to carry out the planned activities, individuals responsible, and resources needed. Key performance indicators were also developed to help measure progress against goals. Per the Real Time Strategic Planning process, outcomes will be continuously evaluated, along with changes in our market position, causing modifications and updates to the activities and tactics across time.
WSHS Current Business Model

Current Geographic Area

<table>
<thead>
<tr>
<th>INCLUDES</th>
<th>DOES NOT INCLUDE</th>
</tr>
</thead>
</table>
| - Washington State  
- South Sound  
- I-5 corridor (Seattle, Portland, Vancouver)  
- Pacific Northwest  
- International visitors to museum/online | - Physical presence in eastern Washington |

Current Programs/Services

<table>
<thead>
<tr>
<th>OFFER</th>
<th>DO NOT OFFER</th>
</tr>
</thead>
</table>
| - Tacoma Museum District pass  
- Charitable giving  
- Exhibits  
- Field Trips  
- Public programs (lectures/symposium)  
- Research services/Collections  
- Columbia magazine  
- Heritage Capital Projects grants  
- Heritage capacity building  
- Volunteer opportunities  
- National History Day  
- History Commemorations  
- Facility rentals  
- Café/Store  
- Curriculum (weak)  
- Evening Programs (weak) | - Textbook of WA history  
- Exhibit-specific publications  
- Minority-specific exhibits  
- Pre-K services  
- Offsite/mobile program  
- Traveling exhibits  
- Speaker’s bureau  
- Podcast  
- Author talks  
- Summer camps  
- Genealogy  
- History Travel |
WSHS Strategic Plan

Current Customers

<table>
<thead>
<tr>
<th>INCLUDES/SERVES</th>
<th>DOES NOT INCLUDE or UNDERSERVED</th>
</tr>
</thead>
<tbody>
<tr>
<td>– Members</td>
<td>– Volunteers</td>
</tr>
<tr>
<td>– K-12 kids</td>
<td>– Tacoma tourists</td>
</tr>
<tr>
<td>– Seniors</td>
<td>– Families</td>
</tr>
<tr>
<td>– State government/Legislature</td>
<td>– Railroad enthusiasts</td>
</tr>
<tr>
<td>– History lovers/enthusiasts</td>
<td>– Educators</td>
</tr>
<tr>
<td>– History organizations/Heritage</td>
<td>– Rental clients</td>
</tr>
<tr>
<td>– Researchers</td>
<td>– Community partners</td>
</tr>
<tr>
<td>– Local governments</td>
<td>– Native artists</td>
</tr>
<tr>
<td>– Museum Studies students</td>
<td>– Lifelong learners</td>
</tr>
<tr>
<td>– High school students</td>
<td>– College students</td>
</tr>
<tr>
<td>– Pre-school families</td>
<td>– Tacoma history crowd</td>
</tr>
<tr>
<td>– Special needs individuals</td>
<td>– Non-English speakers</td>
</tr>
<tr>
<td>– Minorities</td>
<td>– Local governments</td>
</tr>
<tr>
<td>– Museum Studies students</td>
<td>– Museum Studies students</td>
</tr>
</tbody>
</table>

Museum Audiences

- Field Trips: 22%
- Facility Rental: 25%
- Adult: 24%
- Student: 11%
- Low Income: 1%
- Military: 3%
- Child (0-5): 4%
- Senior (65+): 10%
Since the recession, the Society’s reliance on state funding has diminished, as revenue from earned and contributed sources has risen. Earned revenue has proven to be a reliable funding source, with facility rentals, admissions, and parking revenue as the top income producers. Membership revenue is steady, as are other sources of revenue. The Society is able to secure sponsors for most events and exhibits, but rarely covers all costs for program activities through sponsorships and grants. We need to grow our donor base and focus on cultivating individual donors to generate more major gifts and planning giving revenue.
Market Awareness

**DIRECT/SUBSTITUTABLE COMPETITORS**

**History Link**: bite-sized history

*Comparative Advantages* – An online encyclopedia of Washington history, History Link is accessible, reliable and a trusted source of information.

**Tacoma Historical Society**: focus on Tacoma

*Comparative Advantages* – Tacoma Historical Society serves Tacoma by connecting people with their local history. They have public programs that engage people in local history such as walking tours and a major fundraising dinner.

**The Burke Museum**: natural history and ethnography

*Comparative Advantages* – The Burke’s location within and formal connection to the University of Washington provides significant resources in terms of faculty and student participation. They have a strong fundraising board, and are opening a new facility soon.

**Secretary of State**: biographies and oral histories

*Comparative Advantages* – This office produces traveling exhibits on Washington history, have a statewide presence, manage the State Archives and Library which have significant historic resources, and benefit from the visibility that comes with being associated with an elected official.

**RESOURCE COMPETITORS**

Other Tacoma museums – all other museums (Competing for media, membership, volunteers, donors, board members, audience).

Other cultural organizations

Other State agencies – state budget is a zero sum game as long as revenue solutions are not pursued to address state budget demands.

Area nonprofits (competition for donors in a relatively small area).

The political environment is creating additional competitors as government funding is being cut for other institutions, increasing their reliance on donated funds:

Other archives/collections

Universities/colleges (federal funds)

Social services sector
Our competitive advantages flow from three areas of strength: our facilities, our reputation, and our status as a state institution. The State History Museum and Research Center are impressive buildings that have been well cared for. State capital funds have enabled us to maintain these buildings, updating systems across time to ensure museum standards are met in terms of temperature and humidity controls, care of our collections, and safety of our visitors. As well, capital funds have recently been invested in upgrades to our permanent gallery, further enhancing the visitor experience. The Society enjoys a strong reputation as a trustworthy, scholarly organization that produces quality programs. We have also recently seen a positive shift in perceptions based on our recent attempts to host exhibits and programs that emphasize the relevance of history to modern audiences. Finally, while the State of Washington reduced its investment in the Society during the recession, the State remains the Society’s largest “donor,” provides significant operating and capital funding, as well as funding the Heritage Capital Projects grant program, and other special initiatives that help the Society to meet its statewide mission.


**SOCIETAL TRENDS**

- STEM favored over culture for funding opportunities/programs
- Shifting relationship to technology – return to "real"
- Base of technology knowledge and use as expanded – expectations for speed, accessibility
- Kinetic/participatory learning experiences desired
- Shared authority expected: My voice matters, my thoughts are important, my opinion is important
- Changing political environment
- Civic dialogue being sought/harder to achieve
- Impact-based evaluation/data requirements from funders
- Getting the word out is getting harder: traditional media is failing; too much noise
- Shifting donor expectations by demographic

**LOCAL TRENDS**

- Lack of: bus drivers/reduced field trips support/education funding
- Tacoma/South Sound becoming popular/desirable area
- Thriving maker/art scene in Tacoma
- Curatorial expertise is hard to find outside a few scholars
- Need/Demand for curriculum that serves multiple subjects
- Need to do oral histories before people pass away
- Heritage organizations aging out (leadership)

**WSHS TRENDS**

- Workforce at WSHS: many retirements anticipated; loss of institutional memory
- Volunteers aging and not being replaced
- Running out of Collections space
- Short-staffed: State not restoring prior funding levels
- Fewer Heritage Capital Project grant applicants…but more prepared applicants
- Fewer physical visitors to Research Center/ more image and research orders via online portal
- Requests for higher tech facility rentals
- Requests for trades: media for space rental, etc.
- More demands for offsite interactions: Presentations, Programs, Partnered projects
Real Time Strategic Planning Outcomes

**Mission:** WSHS partners with our communities to explore how history connects us all.

**Vision:** Our vision is to be the recognized destination for Washington State history. We will achieve this by serving as our state’s primary history educator, making history relevant to our modern lives, and supporting civic dialogue where all are welcome.

**OUR STRATEGY SCREEN**

When evaluating new activities, programs, and initiatives we ask:

- Does it align with our strategic goals?
- Is there an identified target audience and will it be meaningful to them?
- Is it sustainable from a cost and staffing perspective?
- Does this strategy connect us with partners or funders?
- Are we utilizing our competitive advantages?
- Who is the champion for this strategy?

**OUR BIG QUESTIONS**

- How do we create meaningful impact in every region of the state?
- How do we build new audiences and grow existing audiences, locally and statewide?
- How do we develop institutional assets to meet the evolving needs of our collection, visitors, and customers?
- How do we grow organizational resources to support our mission sustainably?
- How do we meaningfully embrace inclusion, diversity, equity and accessibility in our operations, programs, and collections?

**LONG TERM OBJECTIVES**

- Update all permanent galleries and improve visitor experience throughout the History Museum
- Solve our collections overcrowding situation
If possible, centralize all Society operations (including collections storage) in one location to reduce costs, improve collaboration, and better support our audiences.

**STRATEGIC GOALS**

*Create meaningful impact in every region of the state.*

<table>
<thead>
<tr>
<th>Activities</th>
<th>Timeline</th>
<th>Department Responsible</th>
<th>Funding Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Through outreach, identify the needs of K-12 educators in history education, and develop a plan to meet those needs onsite, online, and in the classroom.</td>
<td>2017-2019</td>
<td>Audience Engagement</td>
<td>None –Staff time</td>
</tr>
<tr>
<td>Connect audiences across the state to WSHS collections, exhibits and programs through strategic communications, an improved website, and social media.</td>
<td>Ongoing</td>
<td>Marketing and Communications</td>
<td>Hire part time marketing associate in 2019 to support website updates, social media and digital strategies. Existing funds released due to increased state funding for facility maintenance.</td>
</tr>
<tr>
<td>Advance the institutional capacity of heritage organizations statewide through partnered programming, technical support and advocacy.</td>
<td>Ongoing</td>
<td>Audience Engagement</td>
<td>None – Staff time</td>
</tr>
<tr>
<td>Proactively collect items related to the history of the entire state, focusing on underrepresented areas.</td>
<td>Ongoing</td>
<td>Collections</td>
<td>Staff time Staff travel – existing funds.</td>
</tr>
</tbody>
</table>

**Key Performance Indicators:**

1. # served K-12 onsite
2. # served K-12 offsite/online
3. Increased social media engagement measured through followers/views/retweets, etc.
4. # served through heritage capacity building programs
5. # of new collections items by geographic area
**Build new audiences and grow existing audiences, locally and statewide.**

<table>
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<tbody>
<tr>
<td>Conduct an audit of WSHS communication tools and prioritize organizational investment accordingly.</td>
<td>2019</td>
<td>Marketing and Communications</td>
<td>None – Staff time</td>
</tr>
<tr>
<td>Establish a Historian In Residence program to advance the Society’s partnership, interpretation, and educational programming goals.</td>
<td>2020</td>
<td>Director in partnership with Audience Engagement and Development</td>
<td>Endowment of $1 million, or multi-year annual gift of $40,000. Seek funders 2018-2020</td>
</tr>
<tr>
<td>Present exhibits and programs that engage diverse audiences.</td>
<td>Ongoing</td>
<td>Audience Engagement</td>
<td>Can be accomplished with existing funding, but additional grant and sponsorship support will be sought for exhibits and programs.</td>
</tr>
<tr>
<td>Develop and implement a master interpretive plan for WSHM to guide re-development of permanent exhibitions and public spaces.</td>
<td>Spring/Summer 2018</td>
<td>Audience Engagement</td>
<td>Boeing Foundation and BPA grants Received – $35,000</td>
</tr>
<tr>
<td>Expand WSHS offerings for history engagement, such as online exhibits, improved collections access, podcasts, and videos.</td>
<td>Ongoing</td>
<td>Audience Engagement</td>
<td>Humanities Washington grant Received – $4,500</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>KNKX production partnership (confirmed)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Grant support – planned requests to Cheney Foundation and Murdock Charitable Trust</td>
</tr>
</tbody>
</table>

**Key Performance Indicators**

1. # of visitors onsite
2. Completed master interpretive plan
3. Increased visitor diversity as measured by Morey visitor survey, periodic visitor surveys
4. # served through offsite programs such as online exhibits, podcasts, videos, etc.
Develop institutional assets to meet the evolving needs of our collection, visitors, and customers.

<table>
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</thead>
<tbody>
<tr>
<td>Conduct a facilities master plan focused on opportunities to improve collections preservation, especially reducing overcrowding, visitor experience, and revenue generation.</td>
<td>Fall 2019</td>
<td>Director, in collaboration with Support Services and Audience Engagement</td>
<td>State Capital Project allocation $75,000 – received</td>
</tr>
<tr>
<td>Develop and implement an interim plan to reduce collections overcrowding and improve object preservation, including re-housing the Asahel Curtis collection</td>
<td>2018</td>
<td>Collections</td>
<td>$80,000 – Received from capital budget 2018</td>
</tr>
<tr>
<td>Conduct a 10-year facilities needs assessment and complete minor works projects that support facilities preservation.</td>
<td>2018-2019</td>
<td>Support Services</td>
<td>State Capital Projects allocation $3.5 million to be spent by July 1, 2019</td>
</tr>
<tr>
<td>Prepare for and achieve AAM re-accreditation in 2019.</td>
<td>2017-2019</td>
<td>Director</td>
<td>Reaccreditation fees – $3000, existing</td>
</tr>
</tbody>
</table>

**Key Performance Indicators**

1. Maintain accreditation
2. Completed master plan
3. Completed 10 year facilities needs assessment
4. Completion of identified, funded, capital projects minor works list
5. Completion of collections interim plan
Grow organization resources to support our mission sustainably.

<table>
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</thead>
<tbody>
<tr>
<td>Advocate for full state funding of facility maintenance, collections</td>
<td>Ongoing</td>
<td>Director in collaboration with Board of Trustees</td>
<td>None – staff time</td>
</tr>
<tr>
<td>Prioritize organizational development to promote and build staff capacity.</td>
<td>Ongoing</td>
<td>All departments</td>
<td>Increased training budget – reallocation of existing resources</td>
</tr>
<tr>
<td>Fully utilize WSHM facility by maximizing revenue generation outside</td>
<td>Ongoing</td>
<td>Support Services</td>
<td>Hire rental events coordinator in 2019 with funds released from increased state support for facilities maintenance</td>
</tr>
<tr>
<td>Develop fundraising plan to grow contributed income, prioritizing major</td>
<td>2018</td>
<td>Development</td>
<td>None – staff time</td>
</tr>
<tr>
<td>Develop and implement ‘mini’ membership and donation campaigns, to</td>
<td>Ongoing</td>
<td>Development</td>
<td>Staff time and minimal materials costs</td>
</tr>
<tr>
<td>Conduct audit of existing services and programs to assess relevance and</td>
<td>2018</td>
<td>Director in collaboration with Fiscal</td>
<td>None – staff time</td>
</tr>
<tr>
<td>Develop and implement, with the collaboration of volunteers, an enhanced</td>
<td>Ongoing</td>
<td>Administration (Volunteer Coordinator)</td>
<td>None – staff and volunteer time</td>
</tr>
<tr>
<td>Key Performance Indicators</td>
<td>----------</td>
<td>------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>1. % of administrative, staffing and facility costs covered by the state</td>
<td></td>
<td></td>
<td>---------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>2. % growth in earned revenue</td>
<td></td>
<td></td>
<td>---------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>3. % growth in contributed income</td>
<td></td>
<td></td>
<td>---------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>4. % growth in membership</td>
<td></td>
<td></td>
<td>---------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>5. Strengthened volunteer engagement, measured through total volunteer</td>
<td></td>
<td></td>
<td>---------------------------------------------------------------------------------------</td>
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</tbody>
</table>
| Page | 15
**Embrace inclusion, diversity, equity and accessibility (IDEA).**

<table>
<thead>
<tr>
<th>Activities</th>
<th>Timeline</th>
<th>Department Responsible</th>
<th>Funding Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conduct agency-wide trainings to support IDEA-centered operations.</td>
<td>Ongoing</td>
<td>Administration</td>
<td>Minimal – partner with Rainbow Center and others</td>
</tr>
<tr>
<td>Increase and deepen community partnerships to advance IDEA in hiring,</td>
<td>Ongoing</td>
<td>All departments</td>
<td>None – staff time</td>
</tr>
<tr>
<td>board development, volunteer recruitment, exhibits, and programming.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maintain commitment to financial accessibility for Society programs and</td>
<td>Ongoing</td>
<td>Director</td>
<td>Sponsorship of free days, discounted tickets, and program fees.</td>
</tr>
<tr>
<td>services.</td>
<td></td>
<td></td>
<td>Goal: Increase from $30,000 to $89,000</td>
</tr>
<tr>
<td>Create programming designed to serve individuals with special needs.</td>
<td>2019</td>
<td>Audience Engagement</td>
<td>$10,000 - $50,000, seek grants</td>
</tr>
<tr>
<td>Prioritize IDEA in collections management.</td>
<td>Ongoing</td>
<td>Collections</td>
<td>None</td>
</tr>
</tbody>
</table>

**Key Performance Indicators**

1. # of visitors receiving free or reduced priced admission through access programs
2. Annual training with IDEA focus
3. # visitors served with special needs (through specialized programming)