



FY 2017-18 Performance Plan



HISTORY *Colorado*

Table of Contents

Letter from Executive Director	3
Overview	4
Organizational Chart and Financial Breakdown	5
Department Description	6
Major Function Description	7
Museum Experience	7
Heritage Services	8
Support Services	8
FY 2017 Outcomes and Forecast	10
LIMITED GAMING REVENUE	10
AS A SERVICE PROVIDER FOR HISTORIC PRESERVATION IN THE STATE	10
MEMBERSHIP AND DEVELOPMENT	10
AS AN ENTERPRISE	10
STRATEGIC POLICY INITIATIVES (SPI)	11
SPI 1 Improve Service	11
SPI 2 Improve Customer Experience	12
SPI 3 Become Financially Stable	13
SPI 4 Maintain an Engaged and Supported Workforce	14

All images from the collections of History Colorado unless otherwise noted

Letter from Executive Director

Thank you for your interest in History Colorado's Performance Plan. This year History Colorado has been working to build a stronger connection to the people that we serve. The Board of Directors, along with the Leadership team and staff, have been strengthening our foundation to help develop better exhibits and programs for our audiences. Our community museums are working to become centers for community revitalization. Our preservation programs are continuously working to be the best State Historic Preservation Office in the country and our State Historical Fund grants continue to help communities across Colorado preserve their historic resources. There is much to accomplish, through public interest and hands-on community involvement. We will develop and expand programs throughout the footprint of History Colorado. Partnerships created between local communities and staff at a History Colorado property instill pride and enthusiasm within respective communities for shared history, promoting historic preservation, and creating success stories.

History Colorado has seven significant departments that are grouped into three main support groups that serve our audiences in different ways, but all are dedicated to enriching more lives through the stories of Colorado's history that allow people multiple avenues to explore their curiosity of our past. Due to the breadth of our work, this plan does not outline every department's goals but instead looks at four major priority areas that encompasses all that we do.

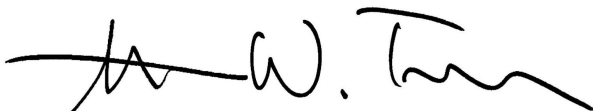
Every year we work to improve our processes and better connect with our staff and our audiences. This year was no exception. During this year's performance planning process, we took the approach to start from the ground up and work with our staff to hear from them on what their goals are for the year and how they define success in their job. The information we received is reflected in this plan and will be used to build an updated Strategic Plan.

The following is our FY 18 Major Function areas and the Strategic Policy Initiatives to support them:

1. Increase Service
 - a. Increase Engagement
 - b. Increase Reach
2. Improve Customer Experience
 - a. Modernize technology that improves customer services
3. Become Financially Stable
 - a. Grow revenue to all programs \$2.5 million in 5 years
4. Maintain an Engaged and Supported Workforce

Thank you all again for taking the time to read this plan; I welcome feedback from readers internal and external to History Colorado.

Sincerely,

A handwritten signature in black ink, appearing to read "Steve W. Turner". The signature is fluid and cursive, with a large initial "S" and "T".

Steve W. Turner, AIA
Executive Director
State Historic Preservation Officer

Overview

Established in 1879, the Colorado State Historical Society, (History Colorado), is an agency under the Colorado Department of Higher Education, an “institution of higher education” in the State of Colorado, and also a 501(c)(3) nonprofit entity under Federal tax law. History Colorado is the State agency entrusted with preserving the stories, places and material culture that document the State’s history for the benefit of Colorado citizens (CRS 24-80-401 et seq).

Through a diverse offering of programs, and venues described in this Performance Plan, History Colorado’s statewide activities support tourism, historic preservation, archaeology, education, and research related to Colorado’s past. Coloradans and people across the country benefit from unique opportunities to interact with Colorado history through its network of museums, tours, and programs. Outreach programs throughout Colorado which provide education, learning skills, research, and historic preservation stimulate community involvement, revitalization, and economic development. Through its administration of State Historical Fund grants, History Colorado has awarded over \$289 million in competitive grants to all 64 counties, resulting in more than \$1.1 billion impact on Colorado’s economy.

With an extensive collection of artifacts, photographs, motion pictures, and sound, History Colorado is in the unique position to connect its audience with Colorado’s history and will continue to expand its audience reach through digitization and a more customized online experience. The agency is committed to providing an inspirational journey into the future by understanding and benefitting from the past.

The staff and Board of Directors at History Colorado are pleased to present this Performance Plan for the FY, 2017-18 under the direction and guidance of the Office of State Planning and Budgeting and the provisions of the State Measurement for Accountable, Responsive and Transparent Government (SMART) Act.

Mission

History Colorado inspires generations to find wonder and meaning in our past and to engage in creating a better Colorado.

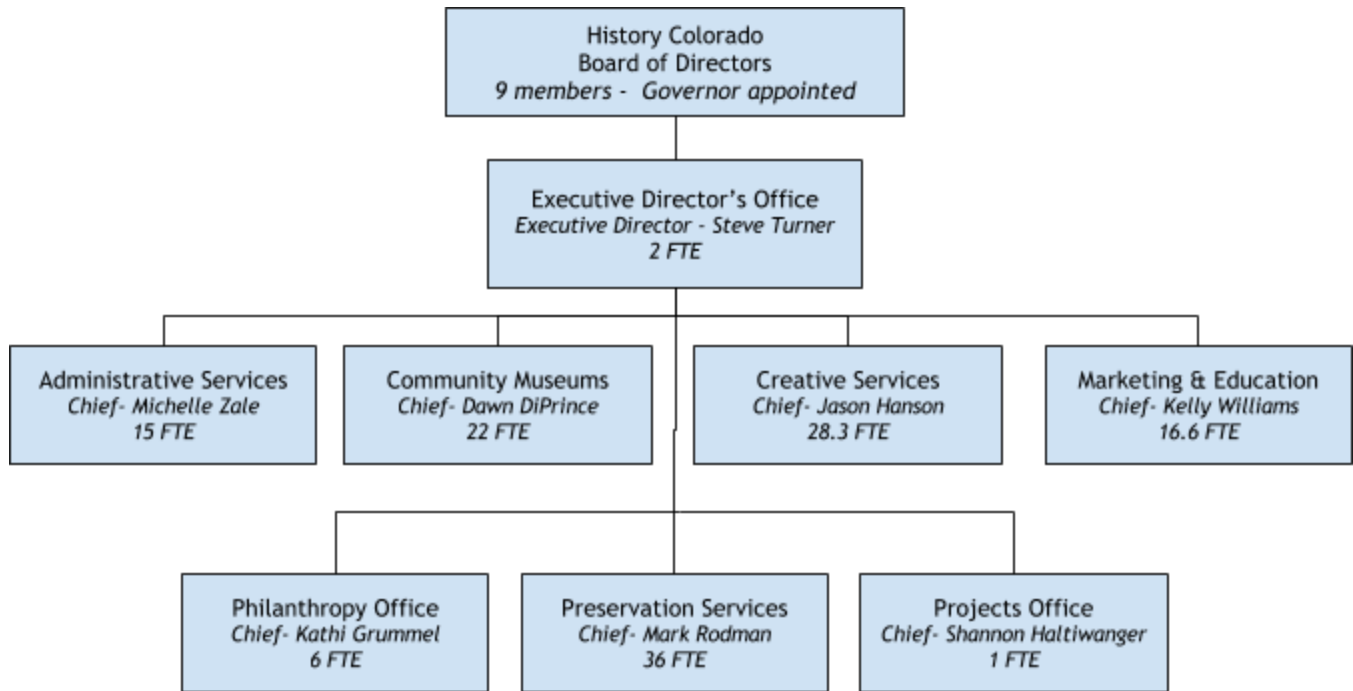
Vision

To connect with Coloradans and enrich all Colorado communities by providing exhibits, educational resources and programs, historic preservation initiatives and stewardship of Colorado’s historic collections.

Values

Excellence	Achieve excellence in all that we do
Integrity	Be forthright, accountable and responsive in our relationships with everyone we serve
Respect	Recognize the contributions, values and the perspectives of the diverse people who make Colorado history
Diversity	Embrace and build diversity among our audiences and throughout our organization
Service	Provide a benefit to the state, audiences, and stakeholders throughout Colorado. Be responsive to public concerns
Collaboration	Bring together all stakeholders in an inclusive manner
Innovation	Encourage creative and innovative approaches to all ideas

Organizational Chart and Financial Breakdown



FY 2017-18 Operating Expense Budget (as per Long Bill; SB 17-254)	
Central Administration	\$1,184,667
Facilities	\$1,477,450
History Colorado Center	\$4,611,859
Community Museum	\$2,948,601
Archaeology & Historic Preservation	\$1,550,534
State Historical Fund Administration	\$1,703,303
State Historical Fund Preservation Grants	\$8,250,000
State Historical Fund Gaming Cities Distribution	\$5,300,000
Certificate of Participation - HCC	\$3,121,813
Total	\$30,148,227

Total Projected Revenue Breakdown (as per Long Bill; SB 17-254)	
Federal Funding	\$900,473
Earned Revenue - History Colorado Center	\$3,611,441
Earned Revenue - Community Museums	\$847,000
General Funds - Community Museums	\$1,461,401
Minority Share Limited Gaming	\$7,917,326
Majority Share Limited Gaming	\$15,253,303
Archaeology & Historic Preservation	\$60,000
Facilities	\$97,283
Total Revenue	\$30,148,227

Additional funding is also provided for other expenses that is not directly attributed to these major functions. Some examples are controlled maintenance at History Colorado regional properties, allocated common policy expenses such as insurance and technology, and off-budget funds generated from philanthropic development.

Department Description

History Colorado in FY 2017-18 comprises of 117.9 FTE (Full time equivalents) and over 500 unpaid staff (volunteers) across seven divisions that are dedicated to preserving the stories, places and material culture that document the State's history for the benefit of Colorado citizens (CRS 24-80-401 et seq.). Staff are located across nine museums and historic sites to serve their communities and surrounding region through exhibits, education, partnerships, and programs.

Sites include:

- Byers-Evans House, Denver
- El Pueblo History Museum, Pueblo
- Fort Garland Museum and Cultural Center, Costilla County
- Fort Vasquez, Platteville
- Grant-Humphreys Mansion, Denver
- Healy House and Dexter Cabin, Leadville
- History Colorado Center, Denver
- Trinidad History Museum, Trinidad
- Ute Indian Museum, Montrose

These museums and sites serve their communities and surrounding region through exhibits, education, partnerships, and programs. For over 138 years defined in statute as an educational institution under the Department of Higher Education, every department is dedicated to educational growth and understanding of what it means to protect and promote Colorado diverse history.

This work is done across History Colorado's operational divisions and include the following public facing aspects:

- Museums and exhibits located throughout the state
- Educational programs and events ranging from K-12 students to the adult learning activity
- Direct community outreach programs
- Access to a vast array of collection resources
- Identifying, documenting, and protecting archaeological resources
- Archaeology learning program and certification
- Access to historic sites and survey location information
- Access and documentation of historic sites with national and state significance
- Consultative services that assess the impact on historic properties and/or cultural resources prior to federal and state funding, licensing, or permitting activity
- Administration of Federal and State tax credits for rehabilitation of historic buildings
- Administration of the State Historical Fund, one of the largest programs in the nation that awards grants to public entities and nonprofit organizations for the purposes protecting, restoring, and documenting archaeological and historical sites and providing education thereon throughout Colorado

Major Function Description

This section provides a brief overview of those primary functions or agency divisions that support strategic performance initiatives in this performance plan.

Museum Experience



Departments that play a key role in museum experience:

- Creative Services (exhibits, interpretation, curatorial, collections, and library)
- Community Museums
- Marketing, Communications, Guest Services, and Education

Museum Experience Primary Customers

- History Buffs
- Researchers and Scholars
- Families with small children
- Elementary and Secondary Students
- Tourists



History Colorado has a statutory obligation C.R.S. § 12.47.1-1201 (2016)(5)(a)(I)(A) says "The state historical society, which was founded in 1879, has a unique role as the state educational institution charged with collecting, preserving, and interpreting the history of Colorado and the west." Creating an engaging experiences at History Colorado properties includes educational exhibits, programs and services that inspire and engage people in the diverse history of Colorado.

The routine introduction of new exhibits and engaging programs are critical to audience engagement, museum attendance, and membership interest. History Colorado exhibits and programs serve families, schools, groups, and individuals of all ages.

History Colorado has developed an aggressive 5-year plan for all

museums' exhibit development, with a commitment to develop its museum exhibits in-house, including several new exhibits, from large-scale marquee exhibits to current exhibit enhancements. Their themes will focus specifically on Colorado's diverse history and will feature artifacts from the state's collections.

The vision of the agency's education and public programs is to increase access to the organization's resources and programs so that more adults, families, and students identify with Colorado's story. Throughout the state, the goal of the education programs is to reach more students and connect them to diverse, relevant, meaningful stories that reflect multiple cultural contributions to Colorado's history. Signature education programs serve children on the autism spectrum, audiences with memory loss and their caregivers, senior centers, recent immigrants and refugees, and preschoolers. Public programs will comprise of revenue-generating programs of excellence that drive membership and museum attendance and highlight the breadth of Colorado history. The guest services staff and volunteers work to deliver personal connection and outreach to ensure that visits to the exhibits and programs are meaningful.

Colorado Statute C.R.S. § 24-80-210 states that "Collections of a scientific or historical nature shall be properly classed and cataloged and shall be at all reasonable hours open for public inspection and examination..." Management and care of the collection is a resource intensive enterprise and it is incumbent on staff to insure collection resources are accessible to the broadest possible audience. The Stephen Hart Library, open to the public free of charge, is a primary access point to the collection for both onsite and remote researchers. History Colorado continues to add collection information to online databases through grant-funded initiatives and provides direct access to resources through a variety of collection-based programs including behind-the-scenes tours, public reference inquiries, and image reproduction services.

Heritage Services



Departments that play a key role in Heritage Service:

- Office of Archaeology and Historic Preservation (OAHP)
- State Historical Fund (SHF)

Heritage Services Primary Customers

- Historic preservationists
- Archaeologists
- Historic building and home owners
- K-12 and university students
- Nonprofits and agencies working with Federal and State agencies
- Developers
- Land use surveyors
- Local governments
- Federal and State agencies
- Legislators
- Congressional delegation

The Office of Archaeology and Historic Preservation fulfills Federal and State statutory responsibilities assigned to the State Archaeologist and the State Historic Preservation Officer. The division safeguards extensive archaeological and historic properties site records and assists with the stewardship of Colorado's historic built environment while, providing access to these resources for researchers, archaeologists, historic preservationists and educators. This program works to creatively engage Coloradans to discover, preserve, and take pride in the state's architectural and archaeological treasures through statewide, community-centered educational programs. For example, OAHP organizes Archaeology and Historic Preservation Month, and provides statewide leadership and partnership support in archaeology and historic preservation efforts.

The State Historical Fund was created by the 1990 constitutional amendment allowing limited gaming in the towns of Cripple Creek, Central City, and Blackhawk. History Colorado is statutorily designated by the General Assembly to administer the State Historical Fund (Limited Gaming Act of 1991 as amended, CRS 12-47.1-1201 and 1202). Through this program, History Colorado oversees a robust competitive grants program, awarding millions of dollars in grants each year to deserving projects and historic properties throughout Colorado. Since 1993, over 4,400 projects received more than \$289 million to support preservation in Colorado. Historic preservation and rehabilitation of historic resources are proven to stimulate economic activity and retain economic vitality in small and large communities. Grants have been awarded in every Colorado county.

Support Services



Departments that play a key role in Support Services

- Facilities
- Accounting and Finance
- Human Services
- Philanthropy & Membership
- Special Projects & Partnerships
- Volunteer program

Support Services Primary Customers

- Members
- Volunteers
- Donors
- History Colorado Staff
- Legislators
- Office of State Planning and Budgeting
- Other State and Federal Agencies
- Partner organizations

The Support Services group works closely with Museum Experience and Heritage Services to ensure that their work is supported and streamlined. They also work to develop and manage the overall agency budget (capital and operational), financial reporting, planning, audit, internal controls compliance with state fiscal rules, management policies and best practices in governmental finance, budgeting, and legislative requests and relations. They oversee the project management for capital construction, maintenance and repairs of buildings and structures, and controlled maintenance, while working to build partnerships. They also cultivate donors and members, manage a robust volunteer program, and oversee special projects that intersect across all departments.

FY 2017 Outcomes and Forecast

LIMITED GAMING REVENUE

Limited gaming revenue is the primary revenue source for the State Historical Fund (SHF) and the History Colorado operations. In FY 2017-18, History Colorado received \$25,385,467.21, of revenue from SHF, which \$20,308,314 will be used to fund History Colorado, State Historical Fund grants, and SHF administrative expenses. The balance, \$5,077,093 will be distributed to the gaming cities of Blackhawk, Central City, and Cripple Creek. Gross limited gaming revenue in FY 2016-17 was the basis for History Colorado's limited gaming allocation in FY 2017-18.

AS A SERVICE PROVIDER FOR HISTORIC PRESERVATION IN THE STATE

Online visitation to Heritage Service resources accounts for a large percentage of the agency's online activity. During FY 2016-17, OAHP and SHF web pages were visited by over 167,000 unique individuals, averaging nearly 14,000 unique visitors per month. The online offerings for OAHP will be expanding in FY 2017-18 as Program for Avocational Archaeological Certification offerings change to include a virtual classroom for some program content and other online access to preservation information.

SHF has an active outreach program that provides assistance to grant-seekers throughout the state. SHF has continued to expand with a satellite office located in Durango, Colorado providing assistance to prospective and successful grant applicants on the western slope.

MEMBERSHIP AND DEVELOPMENT

The end of FY 2016-17 marked a change in the staff and leadership for the Membership and Development programs, now called the Philanthropy Office. Membership is driven by attendance, community interest, and perceived value. Strategies that promote these components are key to the success of the organization. Approximately 6,800 individuals and families provide their commitment and support to History Colorado each year as members. The membership and philanthropy team engages in annual strategies to reach and engage new members, strengthen current members, donors, and sponsors.

AS AN ENTERPRISE

In FY 2017-18, History Colorado began pursuing agency certification through Service Enterprise to open volunteer opportunities throughout all levels of the organization and reach the agency's goal of having staff (both paid and unpaid) feel empowered and connected in the future of History Colorado. The Service Enterprise approach is the equivalent of a "best practices" business plan for volunteer involvement. In FY 2015-16, History Colorado had 503 volunteers who contributed over 31,500 hours with an impact and cost savings of approximately 15.0 FTEs.

STRATEGIC POLICY INITIATIVES (SPI)

SPI 1 Improve Service

Impact the audiences we serve by creating new connections within communities that increase revenue and grows visitation. This is broken in two areas, engagement and reach.

Why is this important?

- Connecting with the agency’s current audience, and targeting new visitors inclined to take part in a History Colorado experience broadens visitation and increases attendance revenue.
- Compelling exhibits and programs for all ages are the primary drivers of museum attendance.
- A broader attendance drives membership.

1a – Increase Engagement

Metric: Increase number of people by 10% attending a History Colorado museums, engaging with digital media, and attending programs.	June 30, 2017 Actual	June 30, 2018 (One-year goal)	June 30, 2020 (Three-year goal)
Total attendance at the History Colorado Center (Includes all museum attendance, special events and onsite/offsite education programs.)	218,306	240,137	290,572
Total attendance at the Community Museums (Includes all museum attendance, special events and onsite/offsite education programs.)	116,016	127,617.6	154,417.3

Initiative Description:

The agency’s goal is to better invest in community and public engagement and by doing so, the agency should achieve attendance growth above a baseline level that generates a return on investment. Visitation data shows that the introduction of new exhibits and successful programs increase visitation significantly. Inspiring exhibits and programs are expected to maintain the current audience base and attract audiences that are inclined to visit, but currently don’t.

Specific actions that will connect with History Colorado’s audiences:

- Produce new and inspiring exhibits that have audience appeal
- Introduce new exhibits regularly and deliver them on schedule
- Integrate collections into exhibits and events
- Connect with new programs and expand current popular programs
- Create effective promotion and visibility
- Cross-promote museums, events and programs
- Connect with and tell the stories of the diverse history of Colorado
- Develop and enhance community outreach programs
- Expand knowledge, understanding and appreciation of archaeology by increasing participation in Program for Avocational Archaeological Certification. Baseline - The program, which has been in existence since 1978, is currently being revised and updated. This revision will, in part, utilize online learning environments to reach a broader and more diverse audience. The goal is 100 participants for this year. Moving forward the program will be looking at the number of new participants to recurring.

1b – Increase Reach

Initiative Description:

History Colorado’s goal is to increase its reach in new markets, communities, and audiences where History Colorado provides service. Communities for History Colorado are defined as geographic, demographic, and cultural.

Specific actions that will increase reach:

- Evaluate current areas of reach for current programs and create a plan of to target areas in need of growth.
- Build and begin implementing a strategy focused on building a collection that is rich in culturally diverse stories and contemporary Colorado history.
- Providing educational resources to underserved communities.
- Improve State Historical Fund outreach to new and existing audiences in different regions of the state by engaging the local leaders increasing applications from new applicants by 5%.
- Promote economic development in rural Colorado through raising the number of applications for the State Historic Tax Credit by 25% from rural Colorado communities including at least one operating farm or ranch.

Metrics to measure progress towards SPI goals

The following measures will be used to manage the progress towards improving employee engagement.

- Conduct an opportunity for growth analysis to identify areas to grow in FY 19
- State Historical Fund FY 2018 baseline is 18 with a growth goal of 5%, so in one year - 20 and in three - 25.
- State Historic Tax Credit baseline for FY 2018 is 7 with a 25% growth goal, so year one is 9 and year three is 14.

SPI 2 Improve Customer Experience

Create a better experience for History Colorado visitors and streamline and improve internal customer service processes. Better address how the agency best serves its audience through technology.

2a – Modernize technology that improves customer services

History Colorado’s goal is to provide responsive and personal portals of engagement in order to compete with other cultural institutions both in Colorado and across the country. History Colorado needs to increase areas of outreach, both online and within the community.

Metric: Hit target completion of key projects by end of fiscal year	June 30, 2017 Actual	June 30, 2018 (One-year goal)
Launch new POS system	Community Museums	all of History Colorado
Online Access to Information Management Services	Launch customer access	

Strategies/Process to drive achievement of SPI

- Create a customer service experience that streamlines ticket sales.
- Allow customers to access Information Management services (Compass, File Searches, Scans) through online applications.
- Finalize the development of the technology to allow submission of National Historic Preservation Act Section 106 projects through an online project portal.
- Improve wireless connectivity in all buildings to improve visitor experiences.
- Launch a new Point of Sales system that connects the organization's ticket sales, gift shop, membership database, and donor records to all museums and historic sites.
- Create a methodology for a baseline of customer satisfaction (future years will be measured and reported).
- Launch new website.

SPI 3 Become Financially Stable

In order to meet the growth needs of the organizations, the agency must increase its revenue and maintain financial stability.

Why is this important?

- Pay future increasing COP payments
- Provide non-classified staff with salary and merit pay increases when they are approved by the General Assembly
- Pay for increasing costs of common policies
- Ensure the future, long-term financial success of the department.

3a – Grow revenue to all programs \$2.5 million in 5 years

Metric: Increase total revenue by an average of \$500,000 each year over the next five years.	FY 17 Totals*	June 30, 2018** (One-year goal)	June 30, 2020 (Three-year goal)
Philanthropic Donations (Restricted and Unrestricted)	\$1,132,871	\$1,200,000	\$1,400,000
Memberships	\$496,391	\$450,000	\$500,000
Museum Revenue (History Colorado Center)	\$609,979	\$694,850	\$918,939
Education & Publication Revenue (History Colorado Center)	\$536,886	\$488,875	\$591,539
Facility Rental and Catering (History Colorado Center)	\$546,129	\$681,000	\$824,010
Facilities and Historic Sites	\$157,251	\$225,000	\$270,000
Historic Preservation Fees	\$71,101	\$85,000	\$100,000
Paid Admission & Fees (Community Museums)	\$135,097	\$160,000	\$223,600
Gift Shop Revenue (Community Museum)	\$169,508	\$255,000	\$356,282
Rental Income (Community Museum)	\$429,365	\$385,000	\$529,062
Totals:	\$4,284,578	\$4,624,725	\$5,713,432

*Numbers are based on actual reported financial results for FY16-17 **Numbers are based on FY2017-18 budget

Initiative Description:

History Colorado’s goal is to increase total revenue to all programs by \$2.5 million in five years in order to ensure the long-term financial success of the agency and ensure the agency can pay for increased Certificate of Participation payments on the History Colorado Center beginning in FY 2021-22.

Strategies/Process to drive achievement of SPI

- Create a Major Gift committee to work on opportunities
- Refine and implement an exhibit schedule that allows rotation and improvements to exhibits
- Develop exhibits, events and programs that will grow revenue and increase audience engagement.

SPI 4 Maintain an Engaged and Supported Workforce

Creating a culture of engagement, investment, and accountability gives employees the tools and support they need. We also want to create an environment where staff can thrive in their career and have a chance to be innovative and creative.

4a – Increase Employee Engagement

Metric: Percent Favorable Response	FY 2015	FY 2018 Goal
number of staff that take the employee engagement survey	31%	80%

Over the last few years, History Colorado has had a significant amount of turnover, and cutbacks to staffing levels and staff-gear programs and initiatives. During FY 2016-17, the board and leadership staff began working on a new strategic direction. For FY 2017-18, the leadership team is working with the board to develop a new five-year plan for the organization that includes working with the staff to build on the foundation from the ground up to refresh the mission, vision, core values, and strategic initiatives of the organization. With the development of the plan, an employee engagement survey for the agency will be created and will be used bi-annually, and for exit surveys. The results will be used to gauge how well the agency is doing at creating internal programs and initiatives that connect with the staff. The results of the statewide employee engagement survey for both fiscal years 2015, and 2018 will be used as a baseline. It is important to note that FY 2015 survey was given during a major transition period for the agency and will be valuable in knowing if the current leadership team has made improvements.

Strategies/processes to drive achievement of SPI

- Develop a process for all staff to be able to participate in the development of the organization's strategic directions
- Invest in employees through essential skills courses in communications, team building and resilience.
- Create a “think tank” for staff to share ideas and develop enterprise revenue ideas.
- Obtain a Service Enterprise Certification to help leverage paid and unpaid staff and their skills across all levels of the organization.

Metrics to measure progress towards SPI goals

The following measures will be used to manage the progress towards improving employee engagement.

- Number of staff attending monthly all agency meetings.
- Participation by staff in the “think tank” and submitting proposals for ideas to improve enterprise revenue for the organization.
- Number of staff participating in organization events.