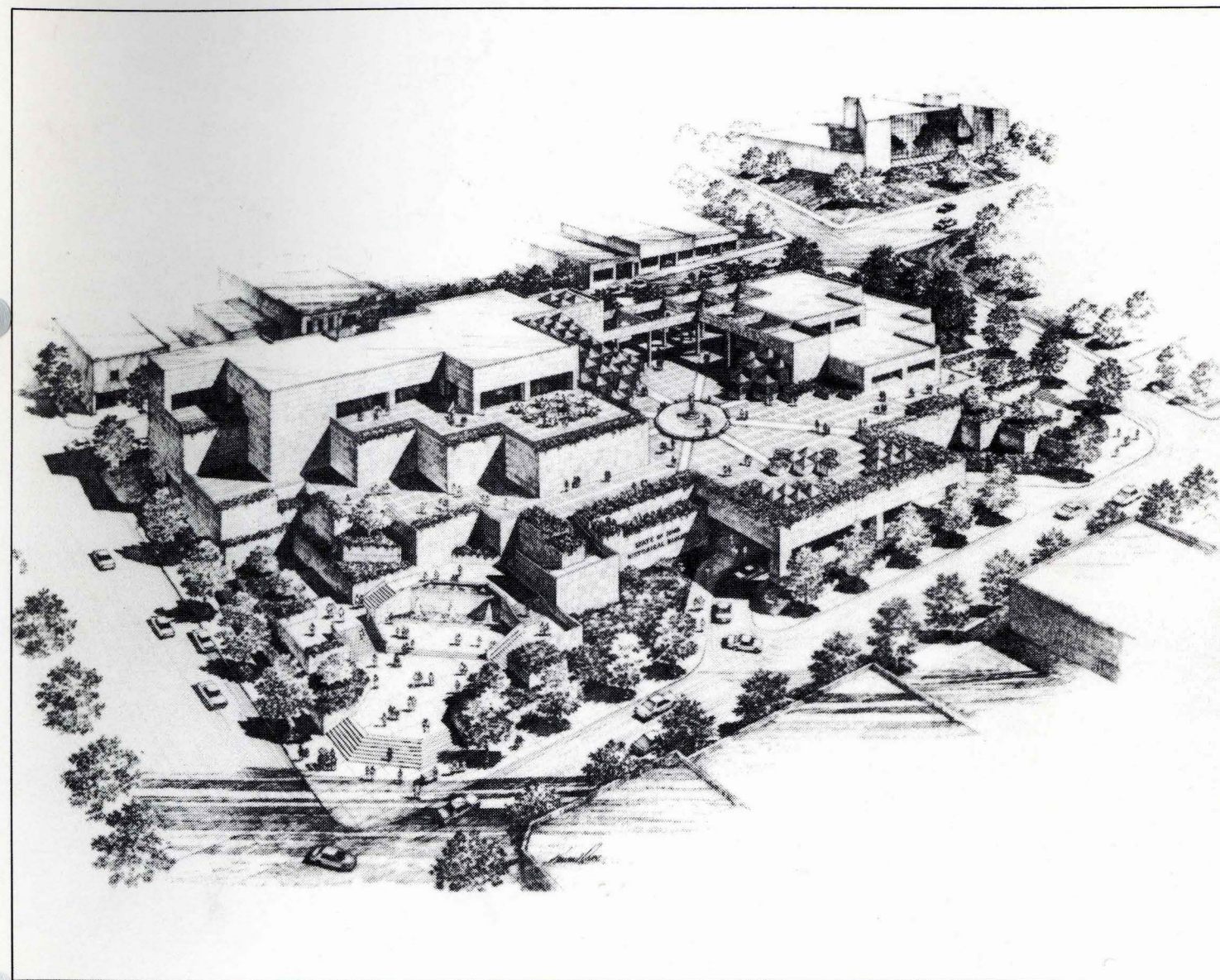


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Trustees for Tomorrow

A Ten Year Plan
for the
Iowa State Historical Department



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TRUSTEES FOR TOMORROW

A TEN YEAR PLAN

for the

IOWA STATE HISTORICAL DEPARTMENT

January 1986



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PREFACE

Periodically in the life of any institution it is fitting to examine what we do, why we do it, and how we propose to continue doing it.

During recent months the Historical Department has been engaged in a thorough, thoughtful, exciting, and sometimes wrenching examination and analysis of our goals, our structure, our activities and procedures, and our relationship with the people we seek to serve. In the process we try always to keep in mind that we are children of the Iowa soil in which we find our roots, as well as citizens of the larger world in which we all live and make our way.

The process has involved a large number of people including the members of the Historical Board and the full time professionals in the Department, all of whom have entered into the planning process with a will. Especially noteworthy is the leadership of Mr. David Crosson, the Department's new Executive Director, whose enthusiasm and knowledge have stimulated and guided the whole planning enterprise.

The Historical Board is delighted to recognize and to commend all the members of the Department who have participated in the hours of study and discussion that have produced this planning document. The Board is also grateful for the heart-warming support and encouragement we have received from the Office of the Governor and from members of the General Assembly.

We recognize that this plan, like all plans, will need periodic review and revision, but that is only to recognize that change is the one certainty of history. Meanwhile, this document is presented with hope, confidence, and a measure of hopeful pride.

----Joseph W. Walt, Chairman
State Historical Board

INTRODUCTION

The Uses of History

What is an Iowan? What are the identifying marks, the tell-tale signs that somehow give a person away, no matter where (s)he currently lives, the subtle suggestions and overt idiosyncrasies that say, "Aha! This is an Iowan"? Iowans don't wear Stetsons. The vast majority does not wear overalls. Our voices resound with no drawl or twang or nasal riff. Iowans don't glow in the patriotic aura of the American Revolution, trip over the renowned battlefields of the Civil War, or swagger with the continuing mythology of westward conquest. Although centers of ethnicity remain, no single group dominates the state. No common identifying tag seems to fit.

Contrary to popular imagery, most Iowans do not own tractors or carry the residue of their occupations dripping from their work boots. Iowans not only read and write (we pride ourselves in literacy) but also think--an activity for which we are often given too little credit by a cynical, urban world. We are neither as ethnically diverse as we see ourselves nor as homogeneous as others see us. It would be difficult to prove, as we too often contend, that all American virtue originates in the heartland. But there really is something different, perhaps precious, about Iowans stubbornly clinging to a work ethic that may appear to a digital, cybernetic, technocratic world as nothing short of archaic.

But, be this as it may, what is an Iowan? What does it mean to live in or be from Iowa? Hawkeye novelist Ruth Suckow offered an explanation of why an "Iowan" is so difficult to define. Iowa, she wrote, "combines the qualities of half a dozen States; and perhaps that is the reason why it so often seems, and more to its own people than to others, the most undistinguished place in the world. . . ." Historian Joseph F. Wall has noted that Iowa is "still peculiarly in the middle." Geographically, demographically, economically, and politically, Iowa "is still seeking to assert its own identity, still hoping there may be virtue in the average."

Part of the definition of being "average" or "in the middle" is being indistinct or indistinguishable. What does it do to a people, a collection of individuals, whose very definition--as Iowans--suggests that they have little distinctiveness, that they are, in fact, representative, a composite? As children use impressions in their earliest years to establish their own identities, relationships, and bonds, so does a state's population collectively absorb and use impressions to establish its collective identity. If those impressions are weak, garbled, or conflicting, the collective identity will be muddled and the bonding will be weak. And this is, to some degree, what is happening--and perhaps has always happened--in Iowa.

Young people take their educations and leave, only partially because of the economy. Other states have lived through economic depressions for years, but the bonding has been stronger, the self-image more positive, and the young people have

EXECUTIVE SUMMARY

stayed or returned home. In addition, millions of tourism dollars leave the state each year because Iowans assume that vacations must be taken elsewhere, that little of significance or interest has happened or is happening in Iowa. And how difficult is it to sell potential corporate investors a state image that we ourselves cannot define? These are all economic problems directly associated with our psychological difficulty in defining ourselves.

Who is responsible for Iowa's collective self-image? Who is the keeper of the state personality? The collective personality of the people who call themselves Iowans is a function of the past interacting with the present, of establishing our identity in space and time. And that is the function of the State Historical Department. The historical image of ourselves affects Iowa's economy, its governance, and its social fabric. The influence of historical perspective and identity is overwhelming, and it must be the mission of the State Historical Department to provide that perspective.

There are many uses of history and even more misuses. The scholarly study of history is valuable for its own sake, as an intellectual exercise, without the need for justification by utility or product. That is one of the proper and valuable roles of colleges and universities. The study of history is also valuable as a reference base for decision making, in Claude Bowers' phrase, "to guard us against the repetition of our mistakes of other days." Thus, the teaching of history in schools is essential and its demise lamentable.

But there is also a role for history to assist a collection of people in identifying itself in space and time, in creating a collective personality. This does not mean that historical facts should be altered for self-serving purposes. By definition, a positive self-image requires that we know all about ourselves and that we like ourselves in spite of our knowledge. Racism and sexism existed and continue. Economic depressions occur. Wars kill. But we are responsible for our own actions, here and now, not for those of our ancestors. The "facts" of history may suggest our alternatives, but they do not choose for us.

The Mission Statement created for the Ten Year Plan contends that the State of Iowa is "obligated to assist its citizens in identifying themselves, individually and collectively, in space and time." "Obligate" is a strong word, but if the state does not do it, who will? And if the state does not actively pursue a program that purposefully establishes a common identity and bonds among its people, it stands to lose a great deal. We are not talking about history in the esoteric sense, here. We are talking about ourselves and our future, about our economic, social, and cultural health. For only through aggressively pursuing and disseminating our history are we ever going to identify that ever-elusive figure for whom we still search, that indefinable, indistinguishable, thoroughly normal person, the "Iowan."

----David Crosson, Executive Director
State Historical Department

As the official trustee of Iowa's history, the Iowa State Historical Department is the state agency with the responsibility and authority to collect, preserve, interpret, and disseminate Iowa's past; encourage scholarly research in Iowa history; work with other agencies to insure the proper teaching of Iowa history in the state's schools; serve as a reference source for other governmental agencies; operate the State Archives; and advocate the preservation, stewardship, and responsible use of Iowa's historical resources.

To accomplish this mission, the State Historical Department has established goals. According to weighted criteria, all goals are prioritized as either Primary, Essential, or Priority. The top Priority ten year goals include: Create and administer comprehensive collections management and development policies. Create an active State Museum and statewide traveling exhibits program. Actively assist and encourage Iowa history teaching at all levels.

Among other important goals that the Historical Department intends to accomplish in ten years are: Coordinate the use and interpretation of all historical sites owned or managed by the State of Iowa. Create a local history data bank accessible throughout the state. Establish regional service capabilities through cooperation with other organizations. Stimulate publication of scholarly research in Iowa history. Sponsor adult historical education programming throughout the state. Provide uniform guidelines for the preservation and use of historical resources. Coordinate implementation of consistent statewide historical records management policies at the county and municipal levels. Promote responsible use of historical resources in tourism and economic development.

Some of the most significant one year programmatic goals include: Totally fund capital and moving costs to the new Historical Building. Expand the Department's funding base through public and private grants and income generation. Plan both a historical collections and a historical sites survey of the state. Design and fund the first major exhibits for the Museum. Begin collecting curriculum materials used in teaching Iowa history in the state's schools.

The State Historical Department has also created a plan "to obtain and efficiently manage the resources necessary to effectively fulfill the Department's mission." Among the ten year management goals, the Department will: Obtain a diversified funding base in which state appropriation amounts to no more than 60% of the total. Eliminate services and programs that duplicate other governmental agencies or private enterprise. Acquire professional museum accreditation. Maintain an active marketing program, based upon systematic research.

Feasibility and market tests will be administered for all proposed services and programs within the first year, and the long range plan will be adjusted to reflect

the results. By July 1986, the Department's organizational structure will be consolidated into five sections: Library and Archives, State Museum, Education and Public Programs, Historic Preservation, and Publications. In addition, departmental Policy Groups and Project Committees (matrix organizations) will be formed to recommend policy and create services, programs, and products. Each matrix organization will contain representatives from the various sections and outside expertise. The State Historical Department will begin implementing the revised organizational structure and its one year goals in stages between January and July 1986.

MISSION STATEMENT

The State of Iowa is obligated to assist its citizens in identifying themselves, individually and collectively, in space and time. The Iowa State Historical Department is the state agency created and empowered by the General Assembly and funded by the State of Iowa, memberships, service fees, income productions, bequests, and other private and public sources, as the official trustee of Iowa's human heritage, with the responsibility and authority to . . .

- . . . identify, record, collect, and preserve the manifestations of Iowa's history, including, but not limited to, documents, printed materials, images, artifacts, and historic sites;
- . . . interpret and disseminate Iowa history through exhibitions, educational programming, printed materials, and other media;
- . . . conduct, stimulate, produce, and provide the resources and opportunities for scholarly research and publication of Iowa history;
- . . . promote and coordinate the teaching, appreciation, and understanding of Iowa history with and through educational institutions and other individuals, organizations, and agencies;
- . . . serve as the primary reference and resource agency on Iowa history for all governmental agencies;
- . . . identify, collect, preserve, and make accessible the official records and documents of state, county, and municipal government;
- . . . advocate the preservation, stewardship, and use of Iowa's historical resources; and
- . . . obtain and efficiently manage the resources necessary to effectively fulfill the Department's mission.

Mission Statement Assumptions

*"History" as used in this document includes pre-history or human history before written records.

*History is process, practice, and product.

*As process,

- . . . history is a collective experience, and
- . . . history is cumulative.

*As practice,

- . . . history is perceived both individually and collectively;
- . . . history is interpretive;
- . . . historical interpretation demands rigorous scholarship;
- . . . historical research requires the preservation and availability of resource materials;
- . . . history must be inclusive; and
- . . . history may be suggestive, but is not predictive.

*As product,

- . . . history should recognize and value diversity and change as well as continuity and stability;
- . . . history should be used neither as apology for the past nor excuse for the present;
- . . . history can and should be fun;
- . . . history can and should foster inquiry; and
- . . . history can and should be marketed.

*State and local history provide case studies of broader historical trends and serve as laboratories for understanding ourselves, individually and collectively, within a more comprehensive context.

*All Iowa citizens are entitled to equal access to their past, consistent with preservation and stewardship of the records and resources of that past.

*The Department has the right to charge reasonable fees for services rendered.

*The Iowa State Historical Department shall conduct itself according to the highest professional standards.

*While the Department should and will seek and acquire financial support from a variety of sources, basic funding must come from the State as an obligation to the people of Iowa.

*All actions and functions of the Iowa State Historical Department are subject to the Constitution, laws, and authority of the State of Iowa.

GOAL PRIORITIZATION CRITERIA

Goals established by and within the Ten Year Plan are placed in three priority categories: Primary, Essential, and Priority. The categorization of goals can and should be re-evaluated and appropriately readjusted from time to time. Priority Goals are mandatory in order to fulfill the mission of the Department. Essential Goals may expand upon that mission or the Priority Goals; they determine the comprehensiveness, rather than the baseline, of the Mission. Primary Goals are those activities, programs, services, or products the Department thinks should be provided. The degree to which the Plan is achieved and accomplished will be determined by the degree to which these goals are met in prioritized order. Criteria used in evaluating and determining the goal priorities are weighted, with the first four criteria receiving weights of 5 and the last six items weights of 3. Weighting is based upon the need to create an internally consistent, integrated plan for the entire Department that realistically assesses the internal and external environment in which the goals must be achieved. The criteria are:

- *the degree to which the goal is clear and logical;
- *the degree to which the goal can be integrated with other goals to accomplish the mission;
- *the degree to which the goal reflects a realistic understanding of both the limitations and potentials of the social, political, and economic environment;
- *the degree to which the goal impacts the entire Department;
- *the degree to which the relationship of the goal to the Mission is direct, rather than indirect;
- *the degree to which the goal is continuing;
- *the degree to which the goal positively impacts user and potential user groups;
- *the degree to which the goal does not directly compete with other state, federal, or local governmental agencies or the private sector;
- *the degree to which the goal can be funded or can generate funds; and
- *the degree to which the goal is required to meet the legislated mandates in the Code of Iowa.

COLLECTIONS

MISSION: . . . identify, record, collect, and preserve the manifestations of Iowa's history, including, but not limited to, documents, printed materials, images, artifacts, and historical sites.

Ten Year Goals

- I. Create and administer a comprehensive, departmental collections management policy, including acquisition, registration, cataloging, storage, use, care, and deacquisition. (Priority)
 - A. Create an integrated cross-reference index of all collections, and make it available to the public.
 - B. Operate artifact and paper conservation programs as support services for the Department and others on a fee basis.

- II. Create a comprehensive, departmental collections development policy. (Priority)
 - A. Create and maintain an inventory of private and public collections relevant to the Department's mission;
 - B. Analyze and prioritize internal collections development needs.
 - C. Actively solicit and acquire collections as prioritized.
 - D. Deaccession items according to established standards and priorities.

- III. Initiate a state historical site preservation and use policy in cooperation with other public and private groups. (Essential)
 - A. Create and maintain a state historical sites inventory.
 - B. Prioritize and coordinate public and private site acquisition and development according to established criteria of significance, preservation needs, and interpretive and tourism value.
 - C. Administer and review standards for the use, management, and interpretation of, and public access to all state-owned historical properties.

- IV. Complete microfilming of the state's extant newspapers, as recommended. (Essential)

Six Year Goals

- I. Review and revise collections policies and priorities. (Priority)
- II. Implement a comprehensive cross-reference information storage and retrieval system that integrates all of the Department's collections. (Priority)
- A. Implement the appropriate technology for information storage and retrieval.
- B. Maintain a continuing program of nonappropriated funding support.
- C. Make the system accessible to the public.
- III. Evaluate collections conservation programs, priorities, and results on a continuing basis. (Priority)
- IV. Process all collections on a current basis. (Priority)
- V. Continue to implement and review departmental collections development policies. (Priority)
- VI. Administer, review, and revise an active collections acquisition and deacquisition program, based upon the recommendations and priorities of the collections development policy and the state historical collections inventory. (Priority)
- VII. Actively maintain a current collections prospect file. (Priority)
- VIII. Maintain and review a state sites inventory. (Essential)
- IX. Implement recommendations of Historical Sites Task Force. (Essential)
- A. Adopt an historical sites acquisitions policy according to the recommendations.
- B. Coordinate and assist private and public implementation of the recommendations.

- C. Implement standards, legislation, and administrative rules and procedures to ensure consistent use, management, and interpretation of, and public access to all state-owned historical properties.

- X. Achieve adequate state appropriation to support public programming, promotion, operation, and maintenance of all sites managed by the Department, or recommend deacquisition or transfer all sites that are not adequately funded. (Essential)
- XI. If recommended and funded, continue to microfilm the state's extant newspapers. (Essential)

Three Year Goals

- I. Implement comprehensive collections policies. (Priority)
- II. Collections Policy Group will review policies and recommend revisions and supplements. (Priority)
- III. Fully implement professional collections storage and care standards. (Priority)
- IV. Continue integration of the Department's collections information. (Priority)
- A. Maintain a unified and current catalog of all library materials and make it accessible to the public at appropriate locations.
- B. Maintain a unified and current catalog of the artifact collections and make it accessible to the public at appropriate locations.
- C. Complete a detailed cross-reference inventory of all collections.
- D. Recommend a cross-reference indexing system that integrates all of the Department's collections.
- E. Recommend the appropriate technology for storage and retrieval of collections information.
- F. Actively solicit grant support and other funding to implement these recommendations.

- V. Fully operate a comprehensive collections conservation program. (Priority)
 - A. Complete a detailed condition inventory of all collections.
 - B. Properly conserve and stabilize new collections as received.
 - C. Create and monitor a continuing work plan for conservation treatment of all collections.
 - D. Adequately equip comprehensive conservation facilities.
 - E. Continue active treatment of all high priority items, and begin mid-priority treatment.
 - F. Maintain an active schedule of contract and fee-for service work to support conservation activities.
 - G. Actively seek grant support and other funding of conservation efforts.
- VI. Maintain the photograph collection according to consistent departmental standards. (Priority)
- VII. Complete the processing of any exceptional backlog of library materials. (Priority)
- VIII. Totally integrate acquisition and management of materials for the professional library into the Department's library system. (Priority)
- IX. Implement a comprehensive departmental collections development policy. (Priority)
 - A. Create a mechanism for continuing review of collections development policies and priorities.
 - B. Identify, acquire, and deaccession collections according to established policies and priorities.
 - C. Establish and maintain an active collections prospect file.
- X. Implement a state historical collections inventory. (Priority)
 - A. Recommend and adopt revisions to the collections development policy to reflect the results and priorities of the inventory.

- B. Actively seek nonappropriated funding to support implementation of the recommendations.
- XI. Raise funds to meet the necessary matching requirements of the NEH Iowa Newspaper Project grant. (Priority)
- XII. Evaluate and complete the survey of the state's extant newspapers, according to the plan of the NEH-funded Iowa Newspaper Project. (Priority)
- XIII. Complete a state sites inventory. (Essential)
- XIV. Historical Sites Task Force will review the inventory results and recommend an Iowa historical sites program. (Essential)
 - A. Prioritize sites according to established criteria.
 - B. Recommend listing of appropriate sites on the National Register of Historic Places.
 - C. Recommend public and private actions to acquire, preserve, use, interpret, promote, and/or develop identified historical sites.
 - D. Recommend standards, legislation, and administrative rules and procedures to ensure consistent use, management, and interpretation of, and public access to all state-owned historical properties.
- XV. Achieve adequate state appropriation to support public programming promotion, operation, and maintenance of two sites currently managed by the Department. (Essential)
- XVI. After evaluation and if appropriate, apply for private grant support of microfilming all extant Iowa newspapers. (Essential)

One Year Goals

- I. Within six months produce a comprehensive departmental collections management policy. (Priority)
 - A. Through a departmental Collections Policy Group, recommend policies and implementation procedures.
 - B. Obtain legislation, rules, and procedures to incorporate and enact the approved policies.

- II. Begin implementing comprehensive collections policies within the second six months. (Priority)
- III. Through a Moving Project Committee,
 - A. Create a work plan for moving to the new State Historical Building;
 - B. Adopt professional moving, care, and storage standards;
 - C. Identify and request funding for necessary equipment in new State Historical Building; and
 - D. Design a detailed strategy and time schedule for the physical move. (Priority)
- IV. Begin integrating collections information from all departmental locations. (Priority)
 - A. Adopt uniform cataloging systems for all library materials.
 - B. Establish a work plan for creating and maintaining a unified catalog of all library materials.
 - C. Establish a work plan for creating a unified catalog of the artifact holdings.
 - D. Actively solicit grants to support planning and implementing a comprehensive, integrated collections information and retrieval system.
- V. Initiate a collections conservation program. (Priority)
 - A. Complete a preliminary condition inventory of collections.
 - B. Adopt prioritization criteria for conservation treatment.
 - C. Establish a conservation work plan for the Department.
 - D. Begin treating highest priority items.
 - E. Continue current paper conservation program.
 - F. Obtain funding for conservation through appropriation, grants, contracts, and fees.

- VI. Create a work plan and actively seek nonappropriated funding for cataloging, processing, and conserving the photograph collection in Des Moines, according to consistent departmental standards. (Priority)
- VII. Create a work plan and actively solicit nonappropriated funding for processing any exceptional backlog of library materials. (Priority)
- VIII. Amend the Code of Iowa to specifically allow for departmental control of collections and potential income derived therefrom. (Priority)
- IX. Organize all technical materials into a centrally managed professional library. (Priority)
- X. Within six months produce a comprehensive departmental collections development policy. (Priority)
 - A. Through a departmental Collections Policy Group,
 - 1. Create a preliminary subject inventory of the Department's collections.
 - 2. Recommend preliminary, prioritized criteria for evaluating the appropriateness of collections to the Department's mission; and
 - 3. Recommend a preliminary prioritized plan for collections acquisition and deacquisition.
 - B. Initiate implementation of recommendations on the highest priority items.
- XI. Within the second six months begin implementing a comprehensive, departmental, prioritized collections development policy. (Priority)
- XII. Plan a state historical collections inventory. (Priority)
 - A. Create a research design.
 - B. Actively seek outside funding for implementation.
- XIII. Plan and begin to raise funds to meet the necessary matching requirements of the NEH Iowa Newspaper Project grant. (Priority)
- XIV. Continue to survey the state's extant newspapers, according to the plan of the NEH-funded Iowa Newspaper Project. (Priority)

XV. Plan a state historical sites inventory. (Essential)

- A. Create a Historical Sites Task Force of representatives from the public and private sectors to recommend and review criteria for evaluation.
- B. Create a research design.
- C. Actively seek appropriation and outside funding for implementation.

XVI. Evaluate all sites currently managed by the Department. (Essential)

- A. Create a prioritized plan for development and continuing support.
- B. Actively solicit adequate appropriations for sites development and operations.

INTERPRETATION AND DISSEMINATION

MISSION: . . . interpret and disseminate Iowa history through exhibitions, educational programming, printed materials, and other media.

Ten Year Goals

- I. Operate an exhibitions program at the State Historical Museum and throughout the state. (Priority)
 - A. Create major exhibitions at the Museum on a six year rotating cycle.
 - B. Rotate temporary exhibitions at the Museum on a quarterly schedule.
 - C. Circulate temporary exhibits produced by the Department to other institutions and establishments throughout the state, region, and nation.
 - D. Develop supplemental educational materials for exhibitions for the Museum, historical sites, and traveling exhibits.
- II. Publish a multi-focus periodical and other materials intended for a general audience. (Essential)
- III. Create a local history data bank and make it accessible to the public. (Primary)
- IV. Organize, lead, and promote the integrated statewide celebrations of the Iowa Territory Sesquicentennial and the Iowa Statehood Sesquicentennial, and establish guidelines and coordination for local celebrations. (Primary)
- V. Establish regional service capabilities through cooperation with other organizations in Iowa. (Primary)
- VI. Stimulate, sponsor, and coordinate the creation and distribution of media programs on Iowa history. (Primary)

Six Year Goals

- I. Through an Exhibitions Policy Group, monitor and review implementation of exhibition policies and procedures. (Priority)
- II. Establish an Exhibits Project Committee to begin planning a major exhibition in recognition of the 1996 Iowa Statehood Sesquicentennial. (Priority)
- III. Administer a scheduled, privately supported program of traveling exhibits throughout the state. (Priority)
- IV. Create supplementary educational materials for use at the historical sites managed by the Department. (Priority)
- V. Evaluate the educational effectiveness of all permanent exhibits and recommend adjustments accordingly. (Priority)
- VI. Evaluate the effectiveness of the multi-focus periodical for the general audience through the use of market research techniques, competitor analysis, and cost/benefit analyses; and modify the publication accordingly. (Essential)
- VII. Publish newsletter(s) in accordance with public demands and membership benefit schedules. (Essential)
- VIII. Increase Museum visitation by at least 10% per year. (Primary)
- IX. If recommended by the results of a feasibility study, begin implementing through a Project Committee a local history data bank within a limited test market network. (Primary)
 - A. Acquire nonappropriated funding for the project.
 - B. Review and evaluate the project.
 - C. According to the results and recommendations of the pilot project, create a plan to access the local history data bank throughout the state.
- X. Through grants and other funding sources, collect and record in retrievable form appropriate local history information. (Primary)
- XI. Within the fifth year, create and fund through appropriation a statewide Iowa Statehood Sesquicentennial Committee to manage and coordinate state and local sesquicentennial activities. (Primary)

A. Survey similar celebrations in other states.

B. Survey local governments and organizations for potential sesquicentennial participation and activities.

XII. Within the sixth year, the Iowa Statehood Sesquicentennial Committee will,

A. Establish guidelines for the preparation and implementation of local sesquicentennial celebrations;

B. Recommend appropriate statewide sesquicentennial activities;

C. Establish guidelines for public and private support of sesquicentennial activities; and

D. Acquire an appropriation from the General Assembly to support planning and implementation of Iowa's sesquicentennial activities. (Primary)

XIII. Review and evaluate the decentralized provision of services and products, and revise accordingly. (Primary)

XIV. Review and revise the Department's continuing involvement in and distribution of media programs. (Primary)

Three Year Goals

- I. Research, design, fund, fabricate, install, and open all permanent exhibits in the new State Historical Museum on a scheduled, sequential basis. (Priority)
- II. Gradually implement a schedule of four privately funded temporary exhibits per year at the State Historical Museum. (Priority)
- III. Circulate temporary exhibits to other institutions and establishments. (Priority)
 - A. Survey the market for traveling exhibits.
 - B. Identify and acquire nonappropriated funding.
 - C. Establish technical capabilities to manage, schedule, and circulate traveling exhibits.

- IV. Design, implement, and continually update supplementary educational materials for group and individual visits to the State Historical Museum and historical sites. (Priority)
- V. Implement and market an active educational tour program of the Museum and historical sites. (Priority)
- VI. Through an Exhibits Policy Group, implement exhibitions policies and procedures for all of the Department's locations, and review and amend previous policies. (Priority)
- VII. Identify the market profile existing for a general audience multi-focus periodical through the use of systematic market research techniques and competitor analysis. (Essential)
- VIII. Implement revisions in the publication of a multi-focus periodical for a general audience. (Essential)
- IX. Evaluate the impact of the newsletter(s) published by the Department. (Essential)
- X. Achieve an annual visitation of at least 150,000 people to the State Museum. (Primary)
- XI. Through a Project Committee,
 - A. Administer a feasibility study to indicate potential need for, and use and financial support of a local history data bank, accessible throughout the state;
 - B. According to the results of the feasibility study establish a research design and schedule for creating a comprehensive, consistent, and integrated (cross-referenced) bank of information on local history for the State of Iowa;
 - C. If feasible, actively seek grants and other nonappropriated funding for research, market survey, and planning;
 - D. Begin collecting and collating the information to be used; and
 - E. Recommend the appropriate technology for local access to the data bank. (Primary)
- XII. If recommended and funded, fully implement the regional provision of services and products through cooperation with other organizations in the state. (Primary)

- XIII. Through a Media Project Committee,
 - A. Adopt a policy on the Department's involvement in the production and dissemination of media programs on Iowa history;
 - B. Identify, prioritize, and seek nonappropriated funding for appropriate media programs. (Primary)
- XIV. Through the Iowa Territory Sesquicentennial Committee, fund and implement appropriate activities and programs. (Primary)

One Year Goals

- I. Establish an Exhibitions Policy Group to:
 - A. Establish interpretive themes for the Museum's permanent exhibitions;
 - B. Review and approve specific exhibit proposals; and
 - C. Establish exhibition policies and schedules. (Priority)
- II. Through specific Exhibit Project Committees, design and actively seek grants and other nonappropriated funding for research, design, fabrication, and installation of permanent exhibits in the new State Historical Building. (Priority)
- III. Research, design, and acquire private funding for a one year temporary exhibition for the new Historical Building. (Priority)
- IV. Through a Publications Policy Group, within six months,
 - A. Design and create a work plan to administer a market survey to identify the audience(s), content, and format for a multi-focus, general audience periodical on Iowa history.
 - B. Identify sources and seek funds necessary to conduct the market survey and analysis of competitors; and
 - C. Create an implementation schedule for introduction of a revised periodical. (Essential)
- V. Develop and evaluate with focus groups a prototype for a revised periodical. (Essential)

- VI. Identify through market and research techniques the purposes or needs for all newsletters currently published by the Department. (Essential)
 - A. Develop a policy for publication of newsletters in relation to the goals for the membership organization and other communication goals.
 - B. Design and begin publication of appropriate newsletter(s).
- VII. Appoint a departmental Local History Data Bank Project Committee, with outside experts, to create a research design and propose a budget (with identified sources of funding) for planning and implementing a local history data bank, accessible at local levels throughout the state. (Primary)
- VIII. Within six months, design a feasibility study to determine the degree to which the distribution of departmental services and products can be regionally provided in cooperation with other state agencies and public/private organizations. (Primary)
- IX. Implement the decentralization feasibility study and design work plan as appropriate. (Primary)
- X. If feasible, identify and request legislative appropriation to begin the initial provision of services and products in cooperation with other state agencies and public/private organizations. (Primary)
- XI. Through a Media Project Committee,
 - A. Collect and collate an inventory of all media programs on Iowa history;
 - B. Administer a survey to determine the audience(s) and needs for media programming in Iowa history, and;
 - C. Prepare an inventory of existing resources available for media production and distribution. (Primary)
- XII. Create a statewide committee to plan the celebration of the Iowa Territory Sesquicentennial. (Primary)

RESEARCH

MISSION: . . . conduct, stimulate, produce, and provide the resources and opportunities for scholarly research and publication of Iowa history.

Ten Year Goals

- I. Increase use of research collections. (Essential)
 - A. Employ adjunct curators and scholars to perform historical and collections research as needed.
 - B. Develop a privately funded research fellowship in Iowa history.
 - C. Publish a reference guide to Department's archival and manuscript collections.
- II. Create the opportunity to publish scholarly work in Iowa history, as feasible. (Essential)
 - A. Publish or sponsor publication of at least one regularly scheduled monograph series on Iowa history.
 - B. Publish one periodical with the primary function of publishing original, scholarly research on Iowa and regional history.
 - C. Publish or sponsor publication of an updated bibliographic and reference guide on Iowa history.
 - D. Publish or sponsor publication of a multi-volume history of Iowa, based on original scholarly research.

Six Year Goals

- I. Review changes in research use of collections resulting from implementation of the recommendations of the Research Policy Group, and revise the research use programs accordingly. (Essential)
- II. Review and revise the monograph and book publication programs. (Essential)
- III. Through market research, review the performance of the scholarly periodical and revise accordingly. (Essential)

- IV. Through market research, review the performance of the bibliographic and reference works, and revise accordingly. (Essential)
- V. If feasible, fund and implement a work plan to publish or sponsor a multi-volume sesquicentennial history of the State of Iowa. (Essential)

Three Year Goals

- I. Through a Research Policy Group,
 - A. Review and recommend revisions in the employment of use of adjunct curators and scholars;
 - B. Implement, if feasible, a research fellowship program in Iowa history;
 - C. Identify and recommend supplemental and alternative methods of increasing research use of the collections; and
 - D. Evaluate the feasibility of publishing multi-volume history of the State of Iowa, and recommend a work plan, if appropriate. (Essential)
- II. Evaluate recommended alternative monograph and book publication strategies, and adopt and implement an appropriate work plan. (Essential)
- III. Evaluate recommendations, and adopt and implement a work plan for providing a scholarly periodical of Iowa history. (Essential)
- IV. Implement the recommendations of the feasibility study for Iowa history bibliographic and reference works, according to an established work plan. (Essential)
- V. Within twelve months, publish the currently held Iowa history bibliography and reference guide manuscript. (Essential)

One Year Goals

- I. Identify and prioritize project research needs, and fund and acquire adjunct curators and scholars on a priority basis. (Essential)

II. Through a Research Policy Group,

- A. Survey fellowship programs operated by other state historical organizations;
- B. Identify research needs and opportunities in Iowa history;
- C. Identify potential nonappropriated funding sources to support a research fellowship program; and
- D. Recommend the feasibility of, and standards for, implementing a research fellowship program. (Essential)

III. Through a Publications Policy Group,

- A. Survey the scholarly monograph and book publication programs of similar historical organizations in other states;
- B. Identify and evaluate potential alternative publishers and distributors of Iowa history monographs and books;
- C. Conduct a market survey to determine need for and interest in monograph and book publication;
- D. Identify costs and potential sources of continuing, nonappropriated funding; and
- E. According to the research results, recommend alternative monograph and book publication strategies. (Essential)

IV. Through a Publications Policy Group,

- A. Determine the demand for a scholarly periodical of Iowa history through administration of a marketing survey;
- B. Determine the potential production of articles of the quality for inclusion in a scholarly periodical; and
- C. Recommend alternatives for providing a scholarly periodical of Iowa history. (Essential)

- V. Through a Publications Policy Group, conduct a feasibility study for bibliographic and reference works on Iowa history and historical resources. (Essential)

VI. Publish and market a biography of Gilbert Haugen. (Essential)

... and research techniques the purposes or needs
...ment. (Essential)

- VII. Prepare for publication and fund publication of the Iowa history bibliography and reference guide manuscript currently held. (Essential)

EDUCATION

MISSION: . . . promote and coordinate the teaching, appreciation, and understanding of Iowa history with and through schools, educational institutions, and other individuals, organizations, and agencies.

Ten Year Goals

- I. Actively assist and encourage the teaching and integration of Iowa history at the primary, secondary, and post-secondary levels. (Priority)
- II. Operate, serve, and involve a membership organization of at least 10,000 members. (Essential)
- III. Sponsor and promote public programming for a broad range of adult audiences throughout the state. (Essential)
- IV. Provide on a fee basis technical service and information to organizations interested in preserving historical resources and presenting Iowa history. (Primary)
- V. Actively participate in professional organizations and networking structures that encourage, support, and train individuals involved in the preservation, conservation, and interpretation of Iowa's historical resources. (Primary)

Six Year Goals

- I. Review, revise, supplement, and continue to distribute upon request standardized Iowa history packets, including both general and specific subjects. (Priority)
- II. Implement the recommendations of the Iowa History Education Task Force. (Priority)
- III. Establish a permanent structure for continuing review and evaluation of the teaching of Iowa history in the state's elementary and secondary schools. (Priority)
- IV. Evaluate and update material circulated by the Department to schools for use in teaching Iowa history. (Priority)

- V. Continue coordination of the distribution of materials and techniques used in teaching Iowa history. (Priority)
- VI. Evaluate and adjust membership fees and benefits to reflect real costs and market(s). (Essential)
- VII. Administer an active marketing campaign to achieve at least 9,000 members. (Essential)
- VIII. Review and adjust services and products provided to organizations and people, according to costs, internal capabilities, and the market. (Essential)
- IX. Review the Department's adult education plan and programs according to market, mission, and performance, and revise accordingly. (Essential)
- X. Appropriately administer or coordinate history day/month and history club programs, according to previous surveys and recommendations. (Primary)

Three Year Goals

- I. Promote and distribute upon request standardized packets of information on Iowa history, including materials localized to the county from which the request originated. (Priority)
- II. Create, promote, and distribute upon request standardized packets of information on those subjects that are most often requested. (Priority)
- III. Through the Iowa History Education Task Force,
 - A. Survey the pedagogy and content of Iowa history at the elementary and secondary levels;
 - B. Survey the pedagogy and materials used in the academic preparation of teachers responsible for teaching Iowa history;
 - C. Survey the legal requirements, content, materials, and pedagogy of teaching state history at all levels in the other states;
 - D. Establish criteria for evaluating content, materials, academic preparation, and pedagogy in the teaching of Iowa history; and
 - E. Make recommendations, including legislation, if necessary, for implementation of a consistent, statewide curriculum in Iowa

history, including materials, pedagogy, and academic teacher preparation. (Priority)

- IV. Create, fund, and distribute supplementary educational materials to schools, according to the results of the market survey. (Priority)
- V. Coordinate the dissemination of information on the techniques and materials being used in teaching Iowa history. (Priority)
- VI. Implement the recommendations for a children's publication on Iowa history. (Essential)
- VII. Implement a revised membership program to reflect the results of the market survey. (Essential)
 - A. Revise law and bylaws as necessary to implement the changes.
 - B. Create a multi-level membership structure with differentiated benefits.
 - C. Create and administer an active marketing campaign to increase membership to at least 7,500.
- VIII. Implement the recommended adult education programs and support through legislative appropriation. (Essential)
- IX. Evaluate the performance of each program according to participant response. (Essential)
- X. Implement recommendations for appropriate involvement in a history day/month program. (Primary)
- XI. Administer a market survey on the potential for a state junior historian's or history club program and create a plan for implementing the recommendations resulting from that survey. (Primary)
- XII. Implement the recommendations of the Technical Services Project Committee by:
 - A. Obtaining the appropriate legislation and administrative rules;
 - B. Establishing a fee structure based upon the cost of the service or product; and
 - C. Instituting an aggressive marketing campaign. (Primary)

- XIII. Assign and financially support staff to particular local, state, regional, and national organizations in which they can actively encourage, support, or train Iowans involved in the preservation, use, and interpretation of their historical resources. (Primary)
- XIV. Actively promote membership and participation by Iowans in organizations and networks that will encourage and support their involvement in and knowledge of the preservation and interpretation of their historical resources. (Primary)

One Year Goals

- I. Create standardized packets of information on Iowa history, with separate information on each of Iowa's ninety-nine counties. (Priority)
- II. Establish an Iowa History Education Task Force, with broad representation from other educational agencies, organizations, and interests that will:
 - A. Establish a research design and work plan to implement a consistent Iowa history curriculum in Iowa's schools, and establish standards for teacher training in Iowa history; and
 - B. Identify and seek public and private grant support to supplement state appropriations for the development and implementation of an Iowa history curriculum. (Priority)
- III. Administer a survey of elementary and secondary schools to determine the types and formats of materials on Iowa history that the Department should provide schools. (Priority)
- IV. Survey and collect comprehensive samples of materials correctly used in schools throughout the state in teaching Iowa history, if needed. (Priority)
- V. Survey the market(s) for a children's publication on Iowa history, and make recommendations according to the results of that survey. (Essential)
- VI. Administer a market survey with the purpose of determining the benefits, fees, and structure necessary to create the strongest possible membership program. (Essential)

- VII. Through an Education and Programming Policy Group,
 - A. Survey the market for and provision of adult educational programs in the state;
 - B. Survey the forms and content of adult educational programming provided by similar historical organizations in other states; and
 - C. Recommend adult educational programs and alternative strategies for implementation. (Essential)
- VIII. Evaluate the current History Day program in Iowa and determine the appropriate role for the Department. (Primary)
- IX. Create a Technical Services Project Committee to:
 - A. Identify services, information, and products that the Department can provide on or off premises on a fee basis.
 - B. Survey the technical and information needs of local organizations and individuals involved in preservation and use of Iowa's historical resources, and determine their capabilities to pay for those services; and
 - C. Recommend a strategy for pricing and marketing the appropriate services, information, and products. (Primary)
- X. Identify local, state, regional, and national organizations and networks in which departmental participation and leadership will actively encourage, support, or train individuals and organizations involved in the preservation, conservation, and interpretation of Iowa's historical resources; and identify appropriate departmental staff to be involved. (Primary)

GOVERNMENTAL REFERENCE

MISSION: . . . serve as the primary reference and resource agency on Iowa history for all governmental agencies.

Ten Year Goals

- I. Coordinate departmental services to and contact with all federal, state, and local agencies. (Essential)
- II. Provide state and local agencies uniform guidelines for the preservation and use of historical resources. (Essential)

Six Year Goals

- I. Review, revise, and supplement the laws, rules, regulations, and guidelines for the preservation and use of Iowa's historical resources. (Essential)
- II. Survey and evaluate the response of other governmental agencies to the services provided them by the Department, and adjust the Department's structure and performance accordingly. (Essential)

Three Year Goals

- I. Respond to the information and service needs of other governmental agencies and representatives in a coordinated and timely manner. (Essential)
- II. Circulate information on the laws, rules, regulations, and guidelines for the preservation and use of Iowa's historical resources, and when appropriate, train people in the same. (Essential)

One Year Goals

- I. Efficiently and effectively administer the laws, rules, and regulations for which the Department is responsible. (Priority)

- II. Identify the official and unofficial, mandated and informal functions and relationships of the Department with other governmental agencies, functions, and representatives. (Essential)
- III. Recommend the appropriate way to ensure coordinated provision of information and services to governmental agencies and representatives. (Essential)
- IV. Identify present laws, regulations, and guidelines for the preservation and use of Iowa's historical resources. (Essential)

GOVERNMENTAL DOCUMENTS

MISSION: . . . identify, collect, preserve, and make accessible the official records and documents of state, county, and municipal government.

Ten Year Goals

- I. Create and implement a policy that can be consistently administered concerning designation of, time restrictions on, and access to confidential public records. (Essential)
- II. Complete a systematic inventory and appraisal of all state records. (Essential)
- III. Coordinate implementation of a consistent statewide records management policy for county and municipal records. (Primary)

Six Year Goals

- I. Implement recommendations for any additional microfilming of Iowa county records in agreement with the Genealogical Society of Utah (GSU). (Priority)
- II. Administer, review, and revise the legislation, policies, rules, and procedures for designation of, restrictions on, and access to confidential records managed by the State Archives. (Essential)
- III. Through a Project Committee,
 - A. Complete an inventory and appraisal of all state records; and
 - B. Recommend and achieve changes in current records management policies, procedures, and retention schedules to reflect the results of the appraisal. (Essential)
- IV. Review and revise the local records management program administered by the State Archives. (Primary)
- V. Update and supplement training of local officials in implementation of consistent and professional local records management policies and procedures. (Primary)

Three Year Goals

- I. Evaluate the performance of the GSU project and recommend further activity. (Priority)
- II. Complete filming of all county records under the current GSU agreement. (Essential)
- III. Acquire the necessary state legislation, departmental policies, administrative rules, and procedures to consistently and rationally administer restricted, confidential, or classified documents administered by the State Archives. (Essential)
- IV. Seek and acquire an appropriation to inventory and appraise all state records. (Essential)
- V. Complete a survey and reappraisal of all records currently managed by the State Archives. (Essential)
- VI. Initiate on-site inventories and appraisals of state records. (Essential)
- VII. Systematically survey existing local governmental records and records management programs. (Primary)
- VIII. Recommend an appropriate, consistent, and constituent supported local records program for the State Archives. (Primary)
- IX. Recommend and acquire necessary legislation, procedures, and appropriation to implement a local records program for the State Archives. (Primary)

One Year Goals

- I. Survey non-Iowa state and federal legislation concerning designation of and access to restricted, confidential, or classified government documents in the possession of or administered by governmental archives and/or historical agencies. (Essential)
- II. Recommend state legislation, policies, and administrative rules to amend, supplement, or replace those currently existing to consistently and rationally administer restricted, confidential, or classified documents administered by the State Archives. (Essential)
- III. Design a systematic inventory and appraisal of all state records. (Essential)

- IV. Inventory and negotiate agreements for the microfilming of the records in the remaining ten counties under the current agreement with the GSU. (Essential)
- V. Receive approval for and schedule filming of the records in the seventeen counties yet remaining under the current GSU agreement. (Essential)
- VI. Design and seek nonappropriated funding for a systematic survey of county and municipal governmental records and records management programs. (Primary)
- VII. Actively seek grants and other nonappropriated funding to train people in the implementation of the policies and procedures recommended in the local records management manuals. (Primary)

ADVOCACY

MISSION . . . advocate the preservation, stewardship, and use of Iowa's historical resources.

Ten Year Goals

- I. Actively represent and argue for the preservation and protection of the physical manifestations of Iowa's history. (Priority)
 - A. Advocate legislation to encourage the preservation and proper use of properties listed on the National Register of Historic Places.
 - B. Administer the functions and responsibilities mandated by the National Historic Preservation Act, as amended.
- II. Promote public and private use of historical resources in tourism and economic development, consistent with established criteria. (Essential)
- III. Actively coordinate the timely distribution of information on public and private decisions and activities affecting the preservation and use of Iowa's historical resources. (Primary)

Six Year Goals

- I. Review and recommend legislative revisions affecting the preservation and use of historical sites in Iowa. (Priority)
- II. Continue to administer and review the state historical preservation program. (Priority)
- III. Continue to participate in responsible interagency marketing of historical resources for economic benefit. (Essential)
- IV. Review and revise the statewide historical information network. (Primary)

Three Year Goals

- I. Obtain appropriate state legislation for the preservation and use of historical sites in Iowa. (Priority)

- II. Evaluate the effect(s) of the National Historic Preservation Act, as administered in Iowa, and recommend appropriate changes in content and administration at all levels. (Priority)
- III. Survey and determine the tourist and non-tourist economic impact of the state's historical resources. (Essential)
- IV. Participate in a responsible, comprehensive, interagency, public and private marketing strategy for the appropriate, prioritized historical resources. (Essential)
- V. Implement a statewide network of collecting and disseminating information on public and private decisions and actions affecting the preservation and use of Iowa's historical resources. (Primary)
- VI. Design and implement an evaluation of the impact of the historical information network on an individual's knowledge and actions. (Primary)

One Year Goals

- I. Administer the state historic preservation program in accordance with the approved annual work plan submitted to the National Park Service. (Priority)
- II. Create or participate in an interagency network to:
 - A. Recommend criteria for determining the preservation/use priorities of historical resources;
 - B. Recommend criteria for determining the primary level of responsibility (state, regional, or local) for promoting use of historical resources;
 - C. Recommend legislation to implement the above criteria among all appropriate state agencies; and
 - D. Create criteria for evaluating the tourist and non-tourist economic impact of the state's historical resources. (Priority)
- III. Inventory and evaluate the effect of all federal, state, and local legislation concerning historical sites in Iowa. (Essential)
- IV. Survey state and local legislation concerning historical sites in other states. (Essential)

- V. Create a plan for the collection, coordination, and dissemination of information on public and private decisions and actions affecting preservation and use of Iowa's historical resources through a statewide information network. (Primary)
- VI. Identify and recommend appropriate integration of related sources of information on historical resources maintained by other agencies and organizations. (Primary)
- VII. Establish reporting procedures for submitting information to an integrated historical resource information network. (Primary)
- VIII. Design and initiate dissemination of historical resource information throughout the state. (Primary)

ORGANIZATION

MISSION: . . . obtain and efficiently manage the resources necessary to effectively fulfill the Department's mission.

Ten Year Goals

- I. Obtain and maintain a diversified and integrated funding base for the Department's operations. (Priority)
- II. Eliminate services and products that duplicate those provided by other organizations, governmental agencies, or private enterprise, unless justified by cost-efficiency or relationship to mission. (Priority)
- III. Organize and manage departmental staff and activities by function and project. (Priority)
 - A. Integrate volunteers as functional departmental staff.
 - B. Create matrix structures to integrate departmental staff and community expertise in policy and project development and administration.
 - C. Consolidate sections by programmatic function.
- IV. Define and implement an appropriate role for the State Historical Board and other governing or advisory bodies. (Essential)
- V. Regularly evaluate the Department's performance against the Ten Year Plan and revise the plan and/or performance accordingly. (Essential)
- VI. Create and implement a continuing properties maintenance plan. (Essential)
- VII. Maintain an active, integrated marketing program for all of the Department's services and products, based upon systematic marketing research. (Essential)
- VIII. Wherever feasible network or contract with other agencies, organizations, and private enterprise for provision of services and products. (Primary)

- IX. Achieve professional accreditation for all departmental functions for which accreditation programs exist, and maintain accepted professional standards in all operations. (Primary)
- X. Encourage and support professional development of staff. (Primary)
- XI. Operate an integrated departmental public relations program. (Primary)

Six Year Goals

- I. Obtain diversified, integrated, and continuing operating support, of which state appropriation constitutes no more than sixty percent (60%). (Priority)
- II. Review, revise, and maintain an integrated structure and process for applying for and administering public and private grants. (Priority)
- III. Acquire and manage an endowment of at least two million dollars (\$2,000,000). (Priority)
- IV. Evaluate the performance of the organizational structure and revise accordingly. (Priority)
- V. Create only those new programs, services, or products that do not duplicate those provided by other organizations, agencies, or private enterprise and for which a feasibility study produces positive results. (Priority)
- VI. Review and revise the operation and authority of the State Historical Board and/or other governing or advisory boards. (Essential)
- VII. Implement a comprehensive, structured five year review of the Department's Ten Year Plan, review the Department's performance against it, and recommend and implement any appropriate changes. (Essential)
- VIII. Review and revise the volunteer structure and functions. (Essential)
- IX. Use and implement the results of marketing research on a continually more sophisticated level. (Essential)
- X. Achieve professional recognition of individual staff expertise and performance. (Primary)
- XI. Monitor and improve quality of staff participation in professional organizations, research, and publications. (Primary)

- XII. Review and revise the internship program. (Primary)

Three Year Goals

- I. Obtain additional public and private funding for completing, occupying, equipping, and operating the new State Historical Building. (Priority)
- II. Create an integrated departmental structure and process for applying for and administering public and private grants. (Priority)
- III. Implement a feasibility study for creating a permanent endowment to support the operations, programs, services, and products of the Iowa State Historical Department. (Priority)
 - A. Analyze the Department's continuing financial requirements and potential sources.
 - B. Survey the function and structure of supporting foundations and endowments for similar organizations in Iowa and elsewhere.
 - C. Identify and survey potential public and private sources for support of an endowment.
- IV. Recommend structure, work plan, and financial goals for a permanent endowment. (Priority)
- V. Review and revise financial policies and procedures. (Priority)
- VI. Review the performance of the organizational structure and revise accordingly. (Priority)
- VII. According to established criteria of cost-efficiency and importance to mission, transfer or eliminate all programs, services, or products that duplicate those provided by others. (Priority)
- VIII. Implement the recommended governing authority, structure, and appropriate advisory bodies for the Iowa State Historical Department. (Essential)
- IX. Review and evaluate the Department's performance against the Ten Year Plan on an annual basis, and recommend appropriate revisions in the Plan or performance. (Essential)
- X. Implement and fund a continuing schedule of property maintenance. (Essential)

- XI. Implement the recommended structure and work plan to create an active volunteer program. (Essential)
 - A. Integrate volunteers into the staff structure.
 - B. Fund necessary volunteer support.
- XII. Evaluate the success of the marketing research program. (Essential)
- XIII. Coordinate implementation of the recommendations of all marketing research projects. (Essential)
- XIV. Achieve professional accreditation of Montauk and the State Museum, individually, by the American Association of Museums. (Primary)
- XV. Implement professional standards for the performance of all departmental operations. (Primary)
- XVI. Implement and monitor level and quality of staff participation in professional organizations, research, and publications. (Primary)
- XVII. Implement an internship program with acceptable professional standards and adequate funding. (Primary)

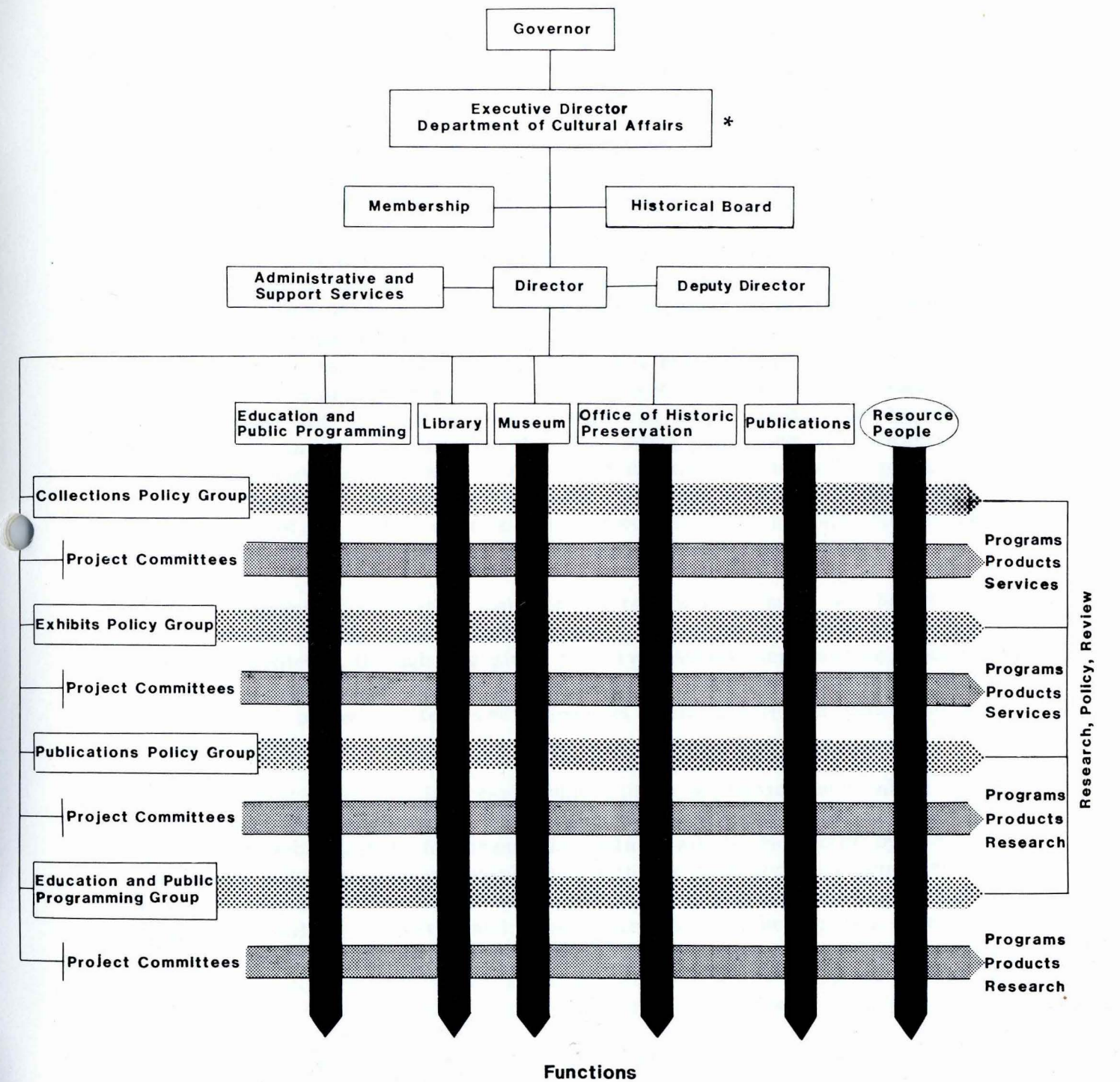
One Year Goals

- I. Obtain adequate public and private funding for completing, occupying, equipping, and operating the new State Historical Building. (Priority)
- II. Identify and establish financial needs and sources for operation of departmental programs for next biennium. (Priority)
 - A. Obtain legislation allowing the Department to create, control, and receive benefits of all potential income-generating activities.
 - B. Obtain legislation allowing the Department to obtain revenue through lease agreements.
 - C. Research the potential of leasing retail space in any of the Department's facilities.
 - D. Implement administrative rules that establish a consistent departmental structure of fees for all products and services.
 - E. Identify and apply for appropriate public and private grant support for individual projects and general operations.

- III. Implement generally accepted financial management policies and procedures, and train staff in administration of the same. (Priority)
- IV. Consolidate all Department operations into sections for Administration and Support Services, State Museum, Library and Archives, Publications, Historic Preservation, and Education and Public Programs. (Priority)
- V. Create intradepartmental Policy Groups and Project Committees, including outside resource persons as necessary and assigned, and train staff in implementation. (Priority)
- VI. Review, evaluate, and revise all job descriptions, classifications, and assignments according to requirements of the Ten Year Plan and the organizational structure. (Priority)
- VII. Identify and prioritize departmental staff development needs. (Priority)
- VIII. Establish performance criteria against which to evaluate implementation of the Ten Year Plan, and review and evaluate performance against those criteria on a scheduled basis. (Priority)
- IX. Identify those programs, services, and products that are duplicated by other organizations, governmental agencies, or private enterprise and evaluate performance against established measures of cost-efficiency and significance to mission. (Priority)
- X. Through a Project Committee,
 - A. Survey structure and function of boards of similar historical organizations in other states;
 - B. Recommend proper authority, structure, management, and accountability for the Iowa State Historical Board and/or any other governing structures. (Essential)
- XI. Complete a volunteer needs assessment survey for the entire Department, and recommend a structure and work plan for meeting those needs. (Essential)
- XII. Review the condition of all properties owned or managed by the Department, and develop a plan for continuing maintenance. (Essential)

- XIII. Create a continuing schedule of prioritized maintenance of the Department's properties, and identify capital funding needs and sources. (Essential)
- XIV. Coordinate all marketing research activities. (Essential)
- XV. Acquire comprehensive information on museum accreditation from the American Association of Museums, and apply for accreditation of the Department's satellite museum, Montauk, at Clermont. (Primary)
- XVI. Identify standards for departmental operations as established by appropriate professional organizations. (Primary)
- XVII. Establish policies and procedures to require and support staff membership and active participation in appropriate professional organizations, and encourage and reward staff research and professional publication. (Primary)
- XVIII. Survey criteria standards, and use of internships in similar historical organizations in other states. (Primary)

Iowa State Historical Department
Proposed Organizational Chart



* Pursuant to the recommendations contained in "A Report on the Restructuring and Downsizing of Iowa State Government," prepared by Peat, Marwick, Mitchell & Co., December 1985.

IMPLEMENTATION PROCEDURES

Implementation of the Department's Ten Year Plan will involve determination by the Department's management and staff of the specific objectives and tasks necessary to accomplish the stated goals. Work plans will be developed for all outcomes or results desired in the achievement of each goal. Current departmental activities have been inventoried and will be modified to permit achievement of the tasks specified in the work plans. All tasks will be identified in measurable terms insofar as possible. Staff assignments will be reassessed and staff members will be assigned to positions most likely to maximize achievement of the plan's general goals.

Inauguration of the new organizational structure will occur simultaneously with the identification of new objectives, tasks, and work plans. The Department's new organizational structure requires two significant changes. First, the operating sections will be reduced from seven to five. Combining the management of the two departmental libraries and the State Archives will require new line assignments for operating functions and personnel supervision. Second, the matrix organizational form will involve the creation of policy groups and project committees to carry out the integrated work of the Department. The matrix policy groups (permanent) or project committees (ad hoc) will be defined in functional terms with appropriate goals, work plans, and personnel assignments. In-house training will facilitate implementation of the matrix organizational structure and help staff achieve the professional level of communication required in a matrix organization.

Determination of evaluation methods and review procedures will be an important aspect of this implementation phase. Evaluation will focus on the results or outcomes achieved through any given activity. Achievement will be consistently measured in a quantitative manner for all activities insofar as possible. Staff job descriptions will be written to permit personnel evaluation that is consistent with the dual responsibility.

Implementation of this long range plan will be sequential, with initial implementation beginning January 1986 and complete structural reorganization by July 1986. Specification of implementation details will be completed by the Department's administration in consultation with the staff and appropriate state officials and consultants during January 1986. During February 1986 personnel reassignments will be completed and training for work within a matrix organization will begin. Work on the newly assigned tasks, policy groups, and project committees will begin gradually between March and July 1986. The new structure will be fully operable in July 1986, coincidental with the beginning of Fiscal Year 1987.

The details of the Department's implementation planning will be available by March 15, 1986. Copies of the implementation plan, excluding confidential personnel information, will be available to interested persons.

PLANNING DESIGN

The planning process for the Iowa State Historical Department is based on a management by results (MOR) planning model adapted from the work of Dale M. McConkey and George A. Steiner. The management by results model, a variant of the well known management by objectives (MBO) planning model, seeks to identify outcomes or results of each stated goal as the focus for all efforts of an organization. This model is particularly appropriate for this Department because it asks the decision makers and staff to identify outcomes or results in areas that are frequently viewed as intangible or nonquantifiable. The level and quality of results or outcomes generally is known to increase and improve as definitions become more explicit and public services more adequately specified.

The initial planning stage for the Iowa State Historical Department was an assessment of the situation or environment in which the Department currently operates. This stage required the development of a detailed inventory of all activities currently performed by the Department, as well as the cost and space requirements for these activities. The staff also engaged in a WOTS UP (Weaknesses, Opportunities, Threats, Strengths) analysis of issues deemed relevant in the present environment.

The second planning stage for the Iowa State Historical Department involved the creation of a mission statement (statement of purpose, or reason for existence). All current staff members, members of the State Historical Board, the Board of Trustees of the State Historical Society of Iowa, and interested public officials and private individuals were asked to suggest appropriate mission elements. The current mission statement was synthesized by the Department's senior management with repeated revisions suggested by all parties.

From the mission statement, the Department developed goals to be accomplished in the next ten years. Goals suggested by individual staff members were assembled into a draft document. Extended discussion with the staff and State Historical Board members resulted in several revisions leading to the present document. From an initial draft of ten year goals the Department's section heads suggested three and six year goals to be accomplished. The Department's senior management prepared the goals to be accomplished in ten, six, three, and one year time periods. The goals development process included programmatic and management goals. The departmental reorganization plan will be accomplished within the first planning year.

Implementation of the plan will include the development of procedures to detail structural reorganization, evaluation procedures, programmatic specifications, and personnel assignments. Implementation will be guided by extensive analysis of the Department's external environmental factors, and the market(s) for its products,

programs, and services. A continuing cycle of program, personnel, and market audiences will be built into the management of the Department's activities. Revision of the Ten Year Plan in view of the evaluations will occur on a regular basis.

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