

Accountability Report Transmittal Form

Agency Name: South Carolina State Museum
Date of Submission: September 15, 2003
Agency Director: William P. Calloway
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I. EXECUTIVE SUMMARY

1. Major Achievements:

Fiscal year 2002-2003 was a year of tremendous turnaround for the South Carolina State Museum! In the midst of redefining change as set in motion by the new Executive Director, the museum delivered phenomenal increases in all measurable performance measures. The staff was challenged to remain respectful of the past but commit themselves to the future. In light of these changes, the museum remained committed to its mission and services. The staff was reenergized and the facility once again became alive with the sounds of engaged school children and joyful families.

The culture of the organization had to be changed from one of resignation to negative influences to a culture that embraced change. The staff learned to use the opportunities presented by that change to redirect and redevelop programs, events, exhibits, and operations. The staff realized that with a cohesive team effort fueled by self-motivation, they could deliver improved performance, productivity, and results even in light of other diminished resources. The museum made these operational changes under a new paradigm of remaining current and competitive in the generic realm of public entertainment options for discretionary time and resources.

A sampling of the results:

Attendance	UP	16%
Admission Revenues	UP	11%
Exhibit Revenues	UP	193%
Educational Visits	UP	23%
Rental Income	UP	26%

- This was accomplished in an industry that experienced negative growth throughout the state and nation!!

A key to these outstanding results was the restructuring and reorganization of the agency's staff. From an approved full time staff of 67 positions, the museum ended the year with only 39 of those positions filled; a reduction of 28 or 42%. By breaking down the 'silo' mentality of the past and by encouraging and demanding team involvement in decisions of importance, the product of the facility was more cohesive and broad in reach and impact. This redirection was due in large part by the consolidation of 16 isolated departments into 7 integrated divisions. Weekly meetings, as well as specific subject planning meetings, attended by the directors of each division created a sense of teamwork and common goal and direction. A related outcome of the restructuring was a huge improvement in productivity. The museums cost ratios relative to Guest attendance, number of programs, and number of exhibits dropped dramatically. A very intentional key strategic decision was made to

reduce dollar resources used on staffing and to instead invest those resources into marketing and product. As a result, the quality of the museum visit improved with the enhanced product. Additionally, the State Museum was able to have a much larger statewide presence by reaching out into the state through marketing into more areas of the state for visitation.

A Sampling of Some of the New Content Introduced in 2002-2003:

Blockbuster (fee charged) Exhibits

- Kinetosaurs, Dinos that Move
- Tutankhamun, Treasures from the Pharaoh's Tomb

Changing Exhibits

- Expanding the Scope. Art from the Permanent Collection
- Guadalcanal
- Iwo Jima
- South Carolina Dispensary
- Civil Engineering in South Carolina
- Treasures from the Attic

Events

- 9/11 Ceremony
- Trick and Treats
- Tartan Festival
- Blue Grass Festival
- Kwanza Celebration

Fund Raisers

- Blues and Jazz
- Beach Blast

Of Course, the key focus of the museum is on EDUCATION. These past year saw 75,425 school children from all over the state visit the facility. That is an increase of 14,341 or 23%! The education department delivered these impressive results even with a reduction in full time staff from 5 to 3. The department was able to actively recruit and train volunteers to help teach and present the different programs and classes offered by the facility. The Education Director was recognized for her efforts with a \$2,500 grant in her honor from the Columbia Junior League.

Earned revenue opportunities and enhancements became a huge focus for the museum. The facility developed several non-traditional sources of revenue including on-site coin operated equipment, contractual service arrangements with outside parties, and off-site retail sales opportunities. The facility rental program, with the help of some paid advertising, also increased both its revenues and the number of users. In total, the museum's earned revenue was UP \$156,000 over prior year!

2. Mission, Vision & Values:

Mission:

Through innovative partnerships, comprehensive collections, and stimulating exhibits and programs, The South Carolina State Museum provides educational environments that entertain, inspire imagination and creativity, and enrich the lives of visitors.

Vision:

The South Carolina State Museum is an ever-changing, innovative institution reflecting the essence and diversity of South Carolina, a catalyst for the cultural and educational development of our state and a model among museums nationally.

Values:

We are committed to our Guests.

We value creativity, integrity, scholarship and innovation.

We are committed to the educational improvement of all of South Carolina's school children.

We provide opportunities for people to learn and have fun.

We create an open, learning, engaging environment for families and community to gather.

3. Key Strategic Goals:

The key current and long term goals of the State Museum is to remain current, competitive, and unique in the market place while maintaining its educational point of difference. The State Museum is competing for discretionary dollars and leisure time with a multitude of other various attractions, events, and places. We must remain diligent listeners to the needs and expectations of the citizens of South Carolina who are the "owners" of the facility. We must remain respectful of the past but committed to the future.

Key goals include:

- Increasing Attendance
- Increasing Earned Revenue
- More Effective Planning
- Creating a Recognized Image and Brand for the Facility
- Maximizing Cooperative Partnerships
- Adding Quality, Innovative Product and Programs
- Developing Alternative Sources of Funding
- Recapitalization

4. Opportunities & Barriers:

The South Carolina State museum has the potential to reach and thus impact many more people. We need to refocus our limited resources (time, staff, and dollars) on priorities that most deliver on the desired results of our missions. As a result, some past tasks deemed important may be discontinued such as our consultation with other museums and comprehensive security coverage. Also impacted has been the elimination of our artifact conservation department and our outreach into the community.

Opportunities:

- Acquiring more volunteers and docents.
- Better utilization of part time labor and more use of volunteers
- Creating productive partnerships with other facilities.
- Training all staff to be more Guest focused on a quality visit experience.
- Reaching out more into the community and into more areas of the State.
- Better utilization of the permanent collection to create new engaging and interactive exhibits,
- Creation of innovative programs and events to stimulate visitation.
- Creation of additional new revenue sources such as food service and concessions.
- Establishment of a beneficial relationship with the new children's museum, Edventure.
- Creation of marketing partnerships that stretch limited advertising funds.
- Writing more operational grants to help fund special needs.
- Providing continued service to the State's museum through our Museum Services department.
- Retooling existing permanent exhibits to bring back their vitality.
- Development of new revenue streams such as contract services, offsite retail, and paid programming
- Enhanced partnership relationship with South Carolina Museum Foundation
- Aggressive marketing to induce more preformed groups to visit.
- Continued planning and development of the OPT Project. This will add an observatory, planetarium and large format theater to the museum, substantially enhancing our commitment to education in South Carolina and making us a major center for science education in the Southeast.

Barriers:

- Sourcing and creating impactful exhibits with diminished funds
- Finding cooperative partners for funding in a tight economy.
- Competition for once exclusive retail product
- Lack of flexibility to eliminate non-productive personnel and replace with productive personnel.
- Motivating Experienced and entrenched staff to do more with less
- Lack of confidence in the operations by the major stakeholders.
- An image of being old and outdated.
- Shifting the culture of an established institution into an environment of change.
- School testing and budget cuts that restrict out of classroom travel.
- Impending opening of a competitive facility in the parking lot.
- Acquiring funding sources for needed facelift of exhibits.
- Reduced budget.
- Reorganized staff has been reduced by 42% in two years.
- The reduction in force of 28 positions has created employee anxiety.
- The continued transition of agency executive leadership into more self directed innovation and accountability

5. Accountability Report Usage

The accountability report is one of the vehicles used by the museum to communicate to the staff and its stakeholders the pertinent issues and resulting strategies and direction for the agency. Business plans and operational plans are thus developed in the context of the information and issues presented in the report.

Each staff member and Museum Commission Trustee will be given a printed copy of the report. Before the first of the year, the report will then be discussed in subsequent staff and board meetings. The Executive Director of the agency clarifies any points and the personnel have a chance to react from their perspective to the information presented.

The report is a valid mechanism that the museum uses to insure all stakeholders understand the issues and see the vision of the facility.

II. BUSINESS OVERVIEW:

1. # of Employees:

- Authorized Full-time Positions (FTE's): 67 (Includes Unclassified Executive Director)
- Positions Filled as of 06/30/03: 39
- Positions Vacant as of 06/30/03: 28
- # of Part-time positions as of 06/30/03: 55

2. Operation Location:

The State Museum is located in the Columbia Mills Building at 301 Gervais Street in Columbia, South Carolina.

3. Expenditure/Appropriations Chart

Attached.

4. Key Customers:

The State Museum is owned by the citizens of the state and supported by the appropriations from the legislature as well as earned funds.

- All people of South Carolina
- Educators
- Traveling visitors & guests from other states & countries
- School Children & teachers from South Carolina & neighboring states
- Meeting and event planners and organizers
- Gift buyers and collectors
- Preformed groups such as church, senior, educational, etc.
- Local museums & institutions of higher education
- The SCFM through museum services.
- Individuals involved in research
- Businesses
- Internal departments

5. Key Stakeholders

- Museum Staff
- South Carolina Museum Foundation
- Museum Commission Trustees
- General Assembly and Governor of South Carolina
- Donors
- Collectors
- Museum Members

6. Key Suppliers:

The State Museum relies on a number of organizations and business to help support the needs of the facility. The organizations derive from both the private and public sector. Staff support, facility support, and product support are all vital to the success of the museum.

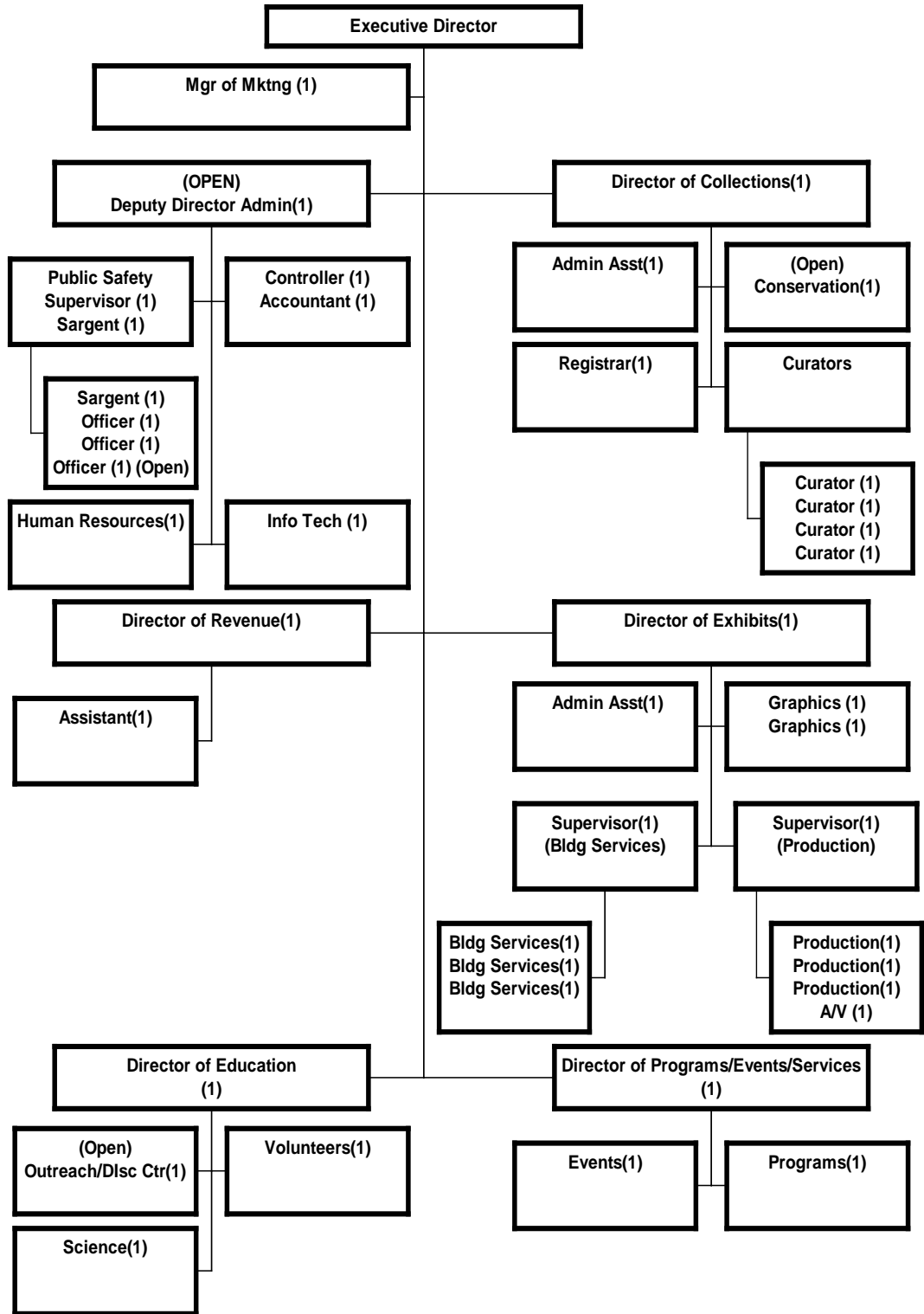
- State of South Carolina
- The South Carolina Museum Foundation
- Volunteer Board and Commission members.
- Other state agencies such as General Services and BPS that provide services.
- Scholars, artist, performers and other craftspeople
- Merchandise, Equipment, Printing, Supply, and Food vendors and purveyors
- People of South Carolina and beyond that donate services and/or items for the collection
- Volunteers

7. Major Products and Services:

The South Carolina State Museum is the primary storyteller of the history of South Carolina. We tell our story through our rich, diverse collection displayed through interactive, engaging exhibits. The galleries housed in our historic building are used to educate, inspire and enrich the lives of schoolchildren and families. We also tell our story through special events and programs that reach out to all segments of the citizens of South Carolina. Specifically we use:

- Interactive, engaging, educational exhibits
- Educational programs and written curriculum
- Web site interaction
- Collection of historical artifacts, scientific specimens and works of art
- Public programs, performances, lectures and workshops
- Special events
- The Museum store (The Cotton Mill Exchange)
- Facility Use Rental
- Fabrication of Exhibits and Graphic Panels for third parties.
- Consultation, assistance & training for other (local) museums/institutions

8. Organizational Chart:



III. ELEMENTS OF MALCOLM BALDRIDGE AWARD CRITERIA:

Category 1 – Leadership

1.1 (a-f)

The senior management team meets weekly to review operations and to make decisions on matters affecting the museum. Staff members are invited to participate as necessary. The directors conduct regular meetings with department heads to receive feedback on management issues. Once per month, the museum holds a separate general staff meeting to give and receive information related to the organization. A volunteer newsletter provides other avenues of communication.

A detailed Business plan with specific department goals and objectives give clarity to mission and purpose. Through that staff collaborative process values and facility culture are instilled. Being a facility that relies on new ideas to generate visitation, we constantly challenge each other to develop new programs and exhibits that we can effectively market in the competitive marketplace.

The South Carolina Museum Commission consisting of nine citizens has ultimate responsibility for the museum. Meeting bi-monthly, the commission 1) sets policy and strategic direction for the museum 2) monitors financial performance, approves internal budgets and recommends budget increases to the Governor and the General Assembly 3) exercises fiduciary responsibility for the museum's collections 4) supervises and evaluates the performance of the executive director and 5) oversees operations to insure consistency with the museum's chartered purpose, strategic plan and state regulations.

The agency director upon arriving performed a thorough analysis of the existing condition of the museum. This included staff and board interviews, data review, and a site inspection. Independently, he had each department director do a similar analysis of their respective area. In a three separate work sessions, the department directors identified and agreed upon the 7 strategic issues presently facing the museum. Using these strategic issues, each director wrote a business plan for their area that used those issues as a background for operational plans and programs.

The Business Plans are composed of three parts - 1) Where are You? Strengths, weaknesses, successes, failures, etc. 2) Where do you want to be? Identify goals and objectives 3) How are you going to get there? A detailed listing of the operational plan for their department of steps that they will take that will lead to the accomplishment of the overall strategic issues of the museum. Also included were what measurement tools they would use to determine successful outcomes. This process began in June and was complete in August.

1.2

Senior management communicates the organization's Guest service focus through the forums listed above. Teaching by example from senior leaders is a prime component of the methodology. A small but important change was made this past year as the staff, through the direction of the Executive Director, now refers to the visitors of the museum as "Guests" versus customers.

1.3

Key performance measures are:

- Number of accessions recorded and objects added to the collection
- Response to public requests for information
- Participation in curriculum-based educational programs & educational experiences for younger audiences
- Performances, lectures, presentations and summer classes offered to enhance cultural appreciation
- Data on value of volunteer contributions
- Production of changing exhibits & presentation of special attractions
- Technical assistance provided to other museums/institutions
- Data related to traveling exhibits
- Information on grants
- Statistics related to the facility rental program
- Attendance by category
- Store sales
- Community Outreach
- Statewide impact and penetration

1.4

The Museum currently does not have a formal process for providing direct employee feedback. Instead, we strive to create an environment of open communication where all employees are encouraged to give constructive feedback to each other. All directors use the facility's performance as a guide when setting personal and departmental goals.

The facility distributes weekly financial and attendance results which are discussed in weekly director meetings. The monthly information is compiled and presented and discussed in the staff wide monthly meetings

1.5

The public is the reason for the museum's existence and therefore all policy/operational decisions must be made with respect to the impact on the public. We address those impacts when deciding new programs and exhibits. All departments are represented at the table and have the responsibility to react to potential public issues. Through specific advisory panels, directors solicit non-staff reaction to proposed programs. The museum's numerous volunteers are another source of public feedback as facilitated through monthly brown bag luncheons.

1.6

Priorities for improvement are set and communicated via the forums listed in 1.1. i.e. Presentation of the yearly business plan sets the strategic direction and the weekly director meetings for action steps and reaction measures.

1.7

The museum supports the community by:

- Providing a cultural and recreational outlet for individuals and families
- The experience teachers and schools have through visitation and programs offered
- Facility rental customers enjoy a unique setting
- Cooperation with other cultural agencies/institutions
- The store promotes South Carolina through it's product offerings

The areas of emphasis are determined by listening to the needs and expectations of the community and by using the talents, knowledge, and experience of the staff. Prior year unfavorable results are specifically targeted for improvement and more detailed examination. Through our zip code data reports and school databases we can determine specific market niches that we are not reaching.

Category 2 – Strategic Planning

2.1-4

The museum operates under a strategic plan adopted in 1999 and updated annually through the business plan process. The plan is the result of an extensive analysis of expectations, strengths, weaknesses, opportunities and threats identified during the planning process and discussed in other sections of this report.

The directors meet with the Executive Director on a continual basis to review and adjust their workplans relative to changes in current conditions. In mid year, a formal recap and resulting adjustment are made to each department plans. This is done in a half day director workshop where each director presents their plan and proposed changes. The other directors then have the opportunity to offer constructive feedback and perhaps alternative solutions.

Communication of the strategic plans are handled as referenced in category 1.

The directors met over a period of 3 months and jointly developed the current set of strategic issues for the museum.

- Increasing Attendance
- Increasing Earned Revenue
- More Effective Planning
- Creating a Recognized Image and Brand for the Facility
- Maximizing Cooperative Partnerships
- Adding Quality, Innovative Product and Programs
- Developing Alternative Sources of Funding
- Minimize Potential Impact of Edventure Children’s Museum Opening
- Recapitalization

Category 3 – Customer Focus

3.1-6

The State Museum provides many kinds of services-exhibitions, educational programs, science demonstrations, videos and films, lectures, performances, tours, facility rentals, publications and educational resource materials-but our most important product is the Guest's experience, which encompasses not only the programmatic elements but also the appearance, cleanliness, safety and friendliness of the facility and staff. The quality of the experience is our most fundamental concern.

Every citizen of South Carolina and every visitor to the Palmetto State potentially are customers of the museum. More than half of our visitors are children. In addition to the students that come with their teachers on organized visits, many other children come with their families, youth groups, clubs, scout groups and summer camps. Adult visitors make up our primary source of admissions revenue.

In our daily operations, we collect information on numbers, categories and points of origin of visitors, age profiles, facility rental customers and other program participants. We use this information to evaluate trends and the success of our promotional efforts. Also, we are able to determine which educational programs the teachers consider most beneficial and which exhibits are most popular.

Category 4 – Information and Analysis

4.1-4

We measure areas related to the operations, processes and systems that define our mission and strategic objectives. The collection of data, referred to in Category 3, provides us with useful insight into the factors that determine our customer's preferences. We are able to use that data in evaluating the effectiveness of our revenue programs and in planning for the future development of new and innovative educational programs.

The museum uses industry compiled data and personal industry contacts to determine relevant comparative data. Trade publications are utilized to see what is happening in the industry and what are some of the new, innovative issue resolutions. Currently, we do informal analysis and comparison based on published data and through personal contact. We have begun to better utilize our current software systems that compiles important visitor data. Our 'VISTA' ticketing system collects Guest admission data while our 'CAM' retail software collects Guest retail spending data. Attendance and spending data is collected daily and weekly and monthly reports are generated and distributed.

Category 5 – Human Resources

5.1-6

1. The Executive Director sets the tone for all staff relationships by providing hands on, supportive leadership. Staff is encouraged to participate in the planning of changes in exhibits and programs. A revised process of new exhibit planning now requires meetings with representation of all facility disciplines thus enabling a team approach to solutions rather than a sequenced process where individual department solutions are developed in isolation and then passed along to the next one.
2. The Human Resource manager works in collaboration with OHR to present relative and necessary trainings. This past year trainings were held on sexual harassment and right to know. New employee orientation for the agency wide policies and expectations is handled by the Human Resource manager via one on one interviews. Specific departmental trainings are organized by each of the seven departmental directors. The security chief handles safety trainings such as fire drills, fire extinguisher use, and personal safety. The agency is in the process of developing a part time handbook that will clarify to them the code of conduct expectations as well as general policies and procedures.
3. The EPMS system is designed to set clear objectives and expectations for each staff member. With formal reviews yearly, each supervisor sits down with appropriate staff to outline those expectations and goals. The job descriptions are used as a basis for the development of those goals. With staff reductions, an important component of that process is the clear communication that each staff member has responsibility for the overall results of the State Museum not just their designated areas. The performance of the facility has vastly improved with this self motivated accountability
4. The museum has designated a small committee to monitor attitude and job satisfaction. They have named themselves the “Rah-Rah” committee. They are charged with planning staff functions that encourage participation and offer a different setting for everyone to interact with each other. Examples from the past year include a family outing at the Executive Director's residence, pot luck lunches, and melon cuttings.
5. The security department, building services, and the Human Resource manager all work together to monitor the health of the work environment. They constantly meet with each other to evaluate and adjust as needed.

- The staff goes offsite for lectures, talks, and appearances in the community. We have made many radio appearances throughout the year to inform the public on the exhibits, events, and program opportunities at the museum. This past year the staff adopted a group of disadvantaged teenage girls for Christmas. Gifts and donations were collected from staff and delivered to the girls at their resident camp. The State Museum also participates in the annual United Way fund raising campaign in the community.

Category 6 – Process Management

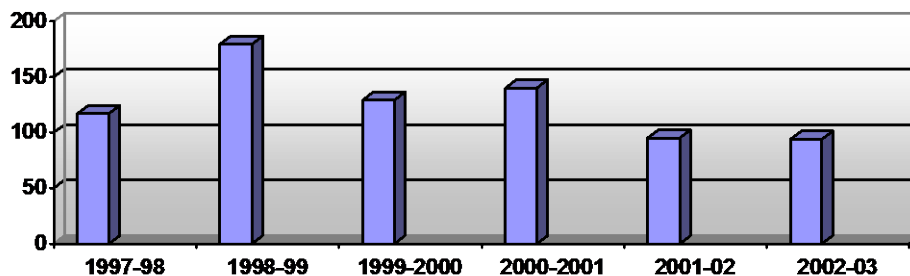
6.1-4

The museum is undertook an extensive review of all processes and programs with the selection of the new Executive Director. We restructured and reorganized our management and reporting channels to adjust for reduced funding and to improve operational efficiencies. We generate daily attendance and revenue reports that are compared to plan and prior year.

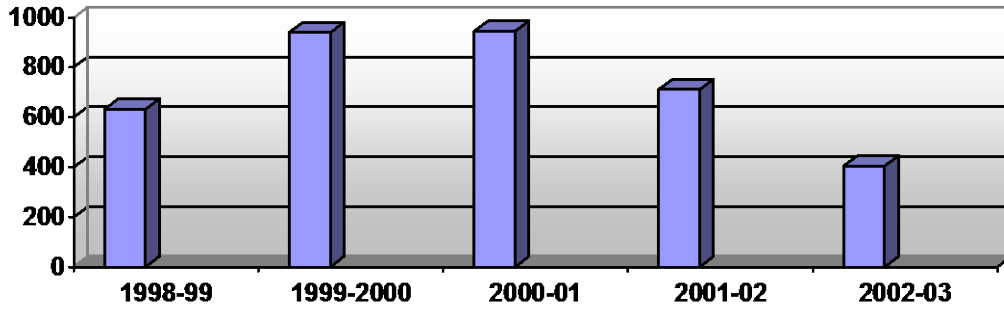
During the budget reductions, we did an evaluation of our operations and took appropriate actions. Every attempt was made to preserve the integrity of all our programs and the educational enjoyment of a Guest visit.

Business Results:

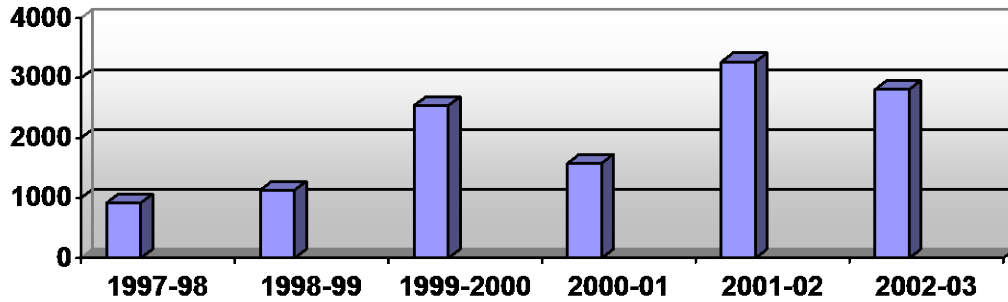
7.10 Number of Accessions Recorded



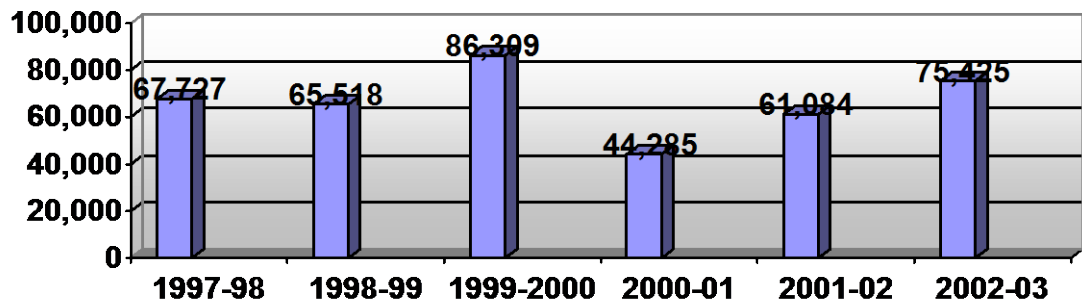
7.20 Number of Individual Objects added to collections



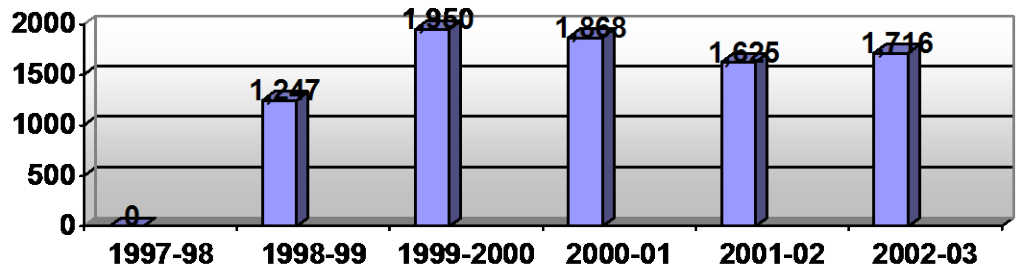
7.30 Number of Public and Institutional Inquiries Answered by Curatorial Staff



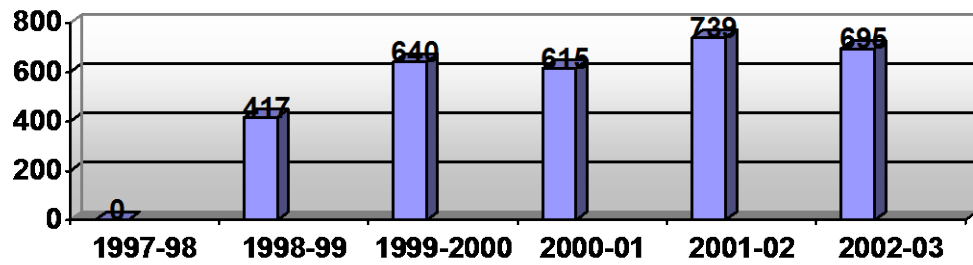
7.40 Number of Students, Teachers and Chaperons Participating Museum Programs



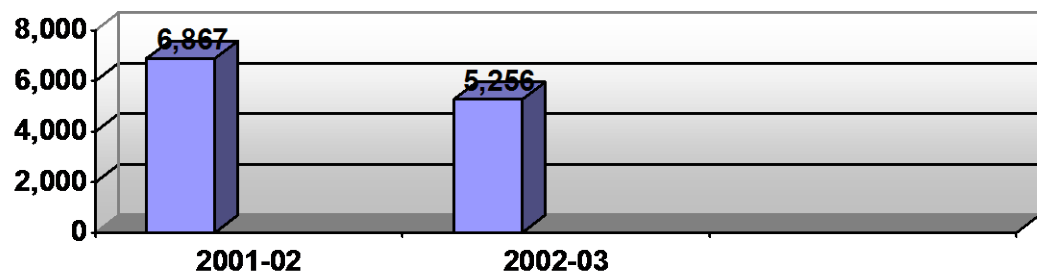
7.50 Number of Camp-In's



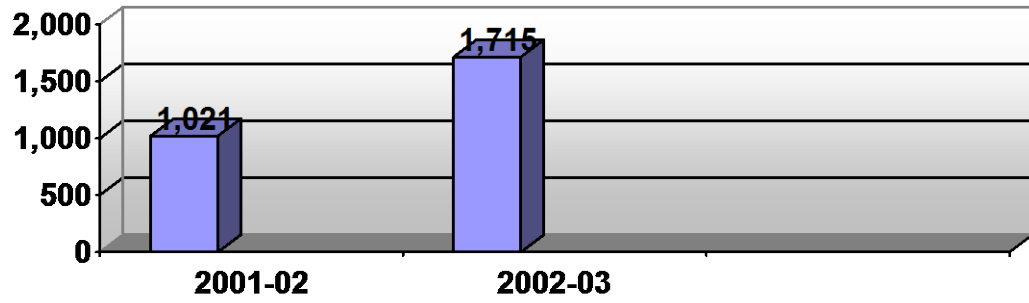
7.51 Number of Birthday Parties



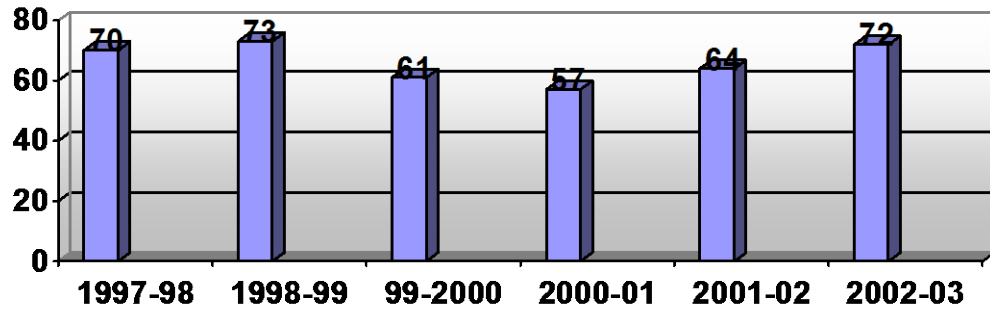
7.52 Number of Starlab Programs Presented



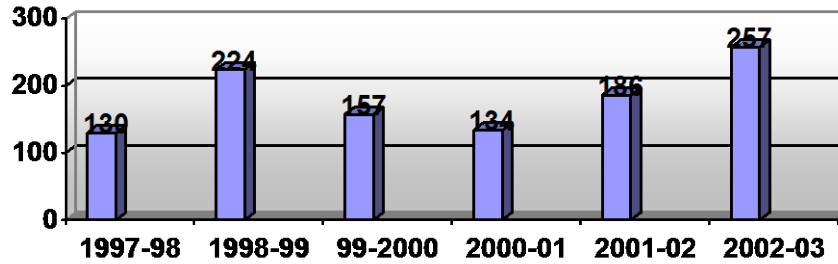
7.53 Number of School Reservations



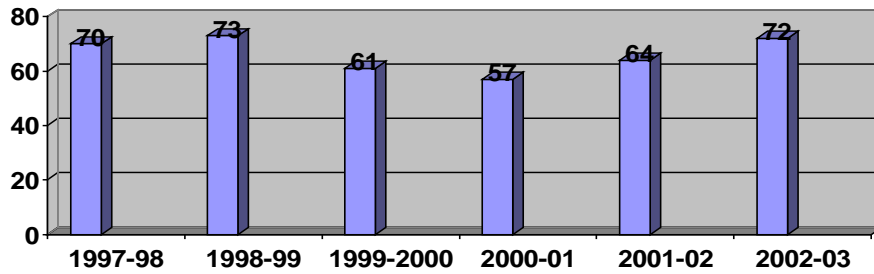
7.60 Number of Public Programs Presented



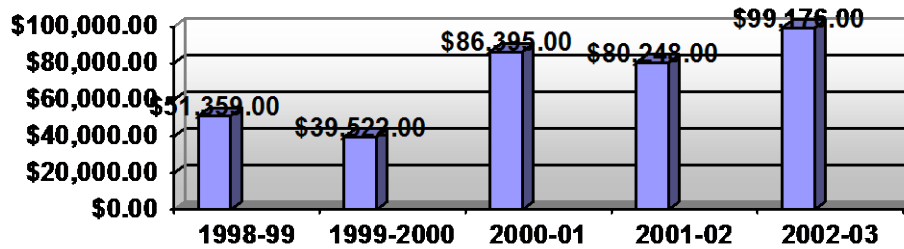
7.80 Number of Active Volunteers During the Year



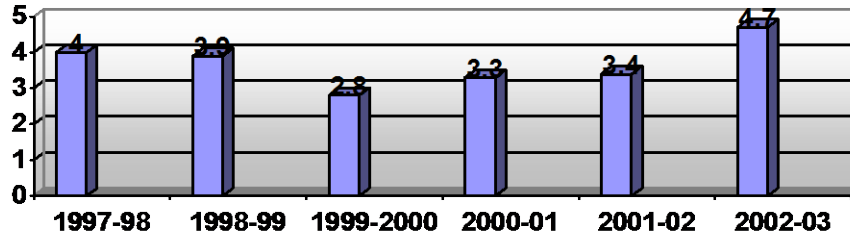
7.60 Number of Public Programs Presented



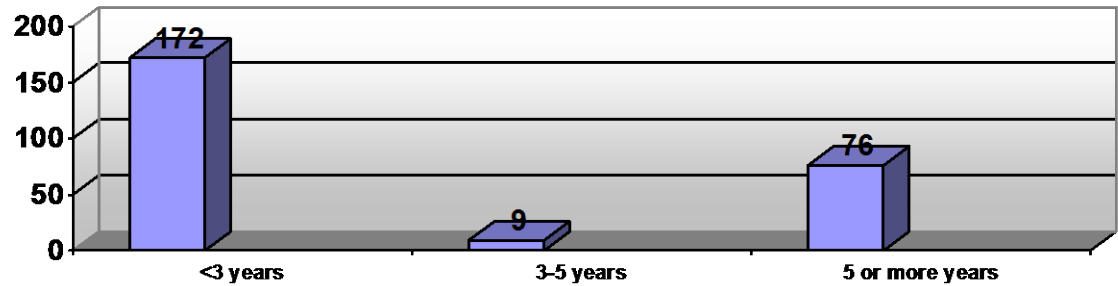
7.10 Value of Volunteer Hours



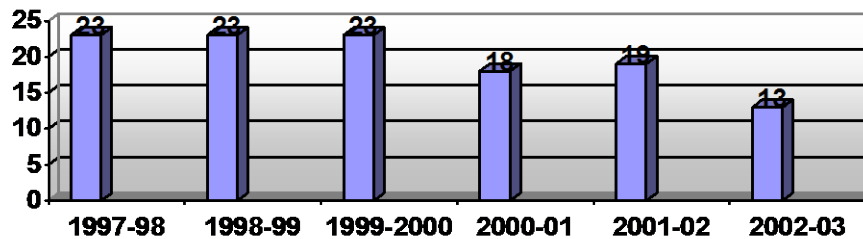
7.11 FTE Equivalency of Volunteer Hours



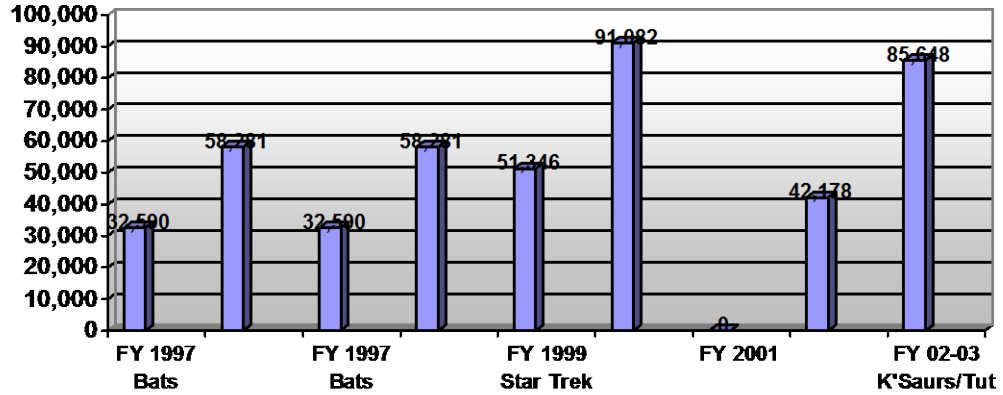
7.12 Number of Volunteers Serving



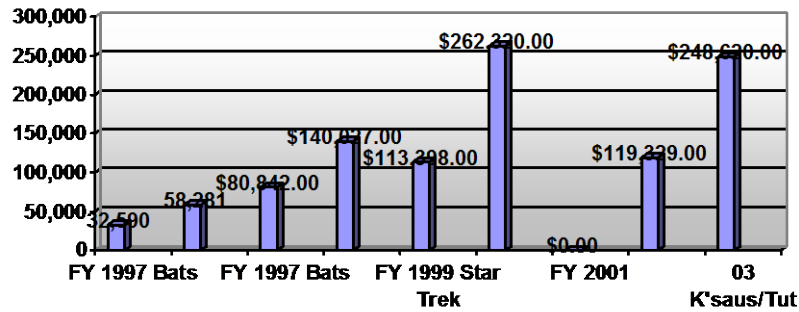
7.13 Number of Changing Exhibits Completed



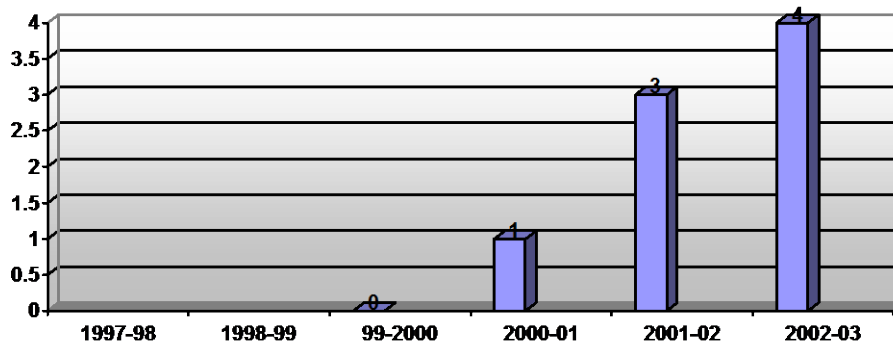
7.14 Attendance for Special Attractions



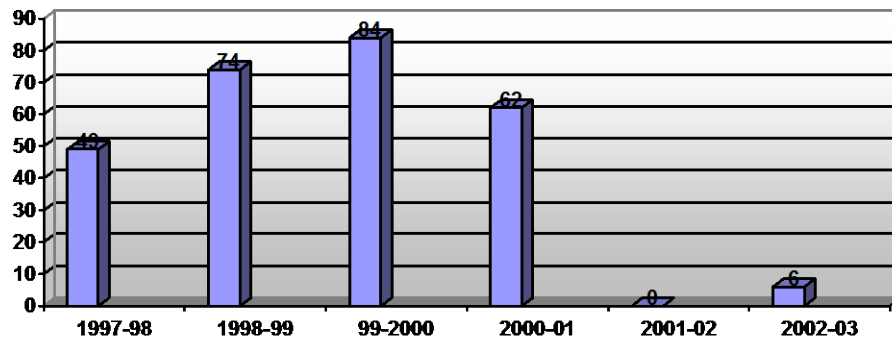
7.15 Gross Revenue-Special Attractions



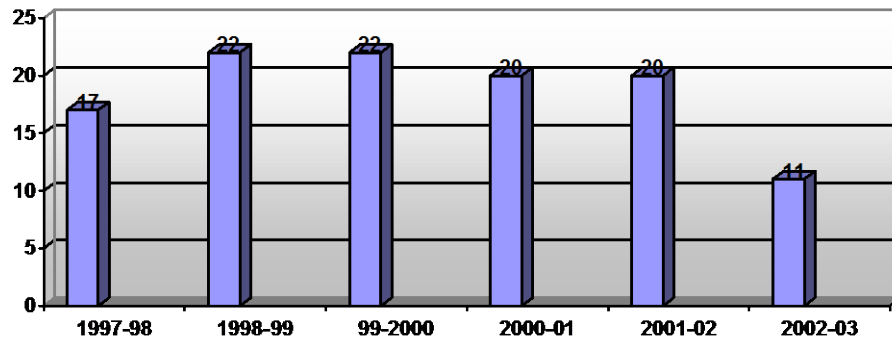
7.16 Traveling Exhibits Completed



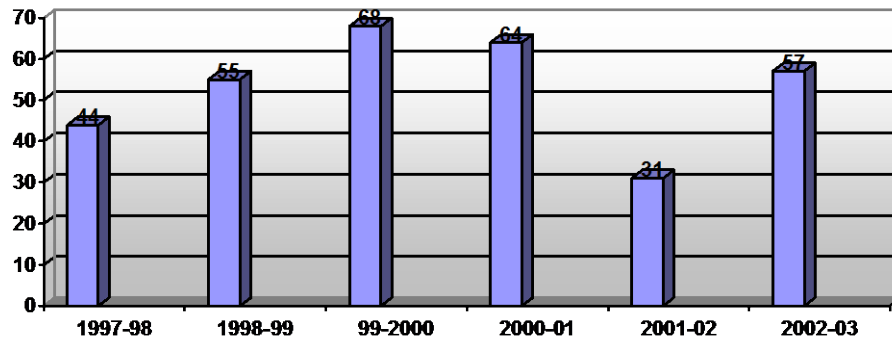
7.17 Number of On-site Consultancies Conducted by Museum Services



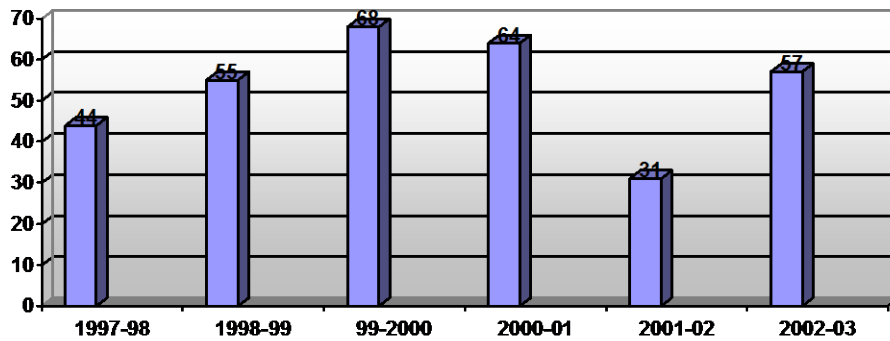
7.18 Number of Traveling Exhibits Available



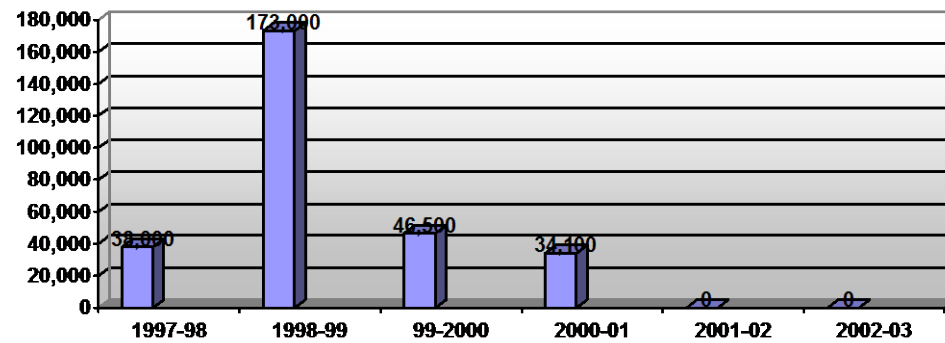
7.19 Number of Traveling Exhibits Bookings



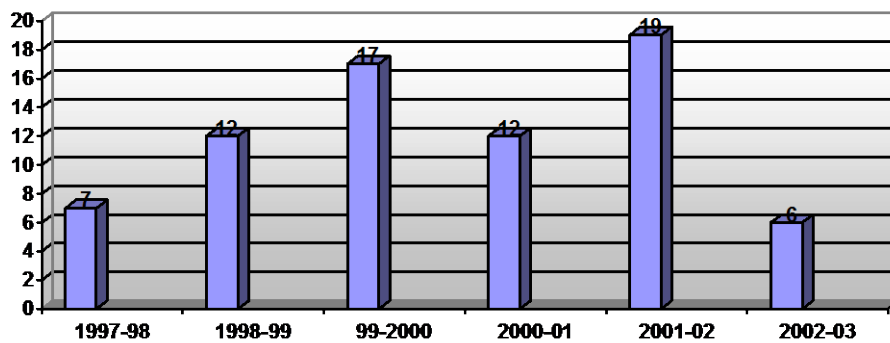
7.19 Number of Traveling Exhibits Bookings



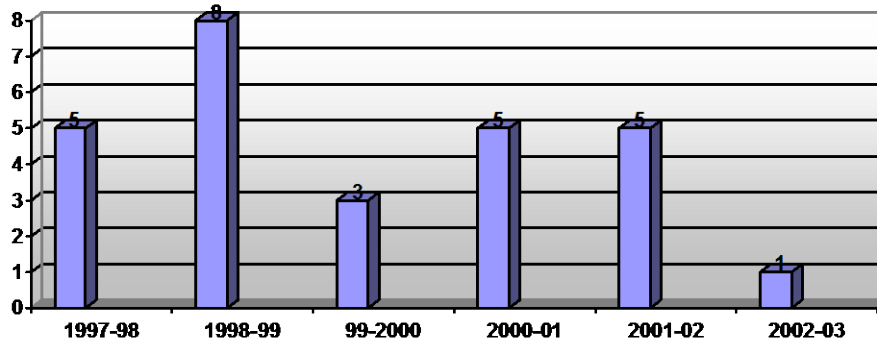
7.21 Number of Traveling Exhibits out of State



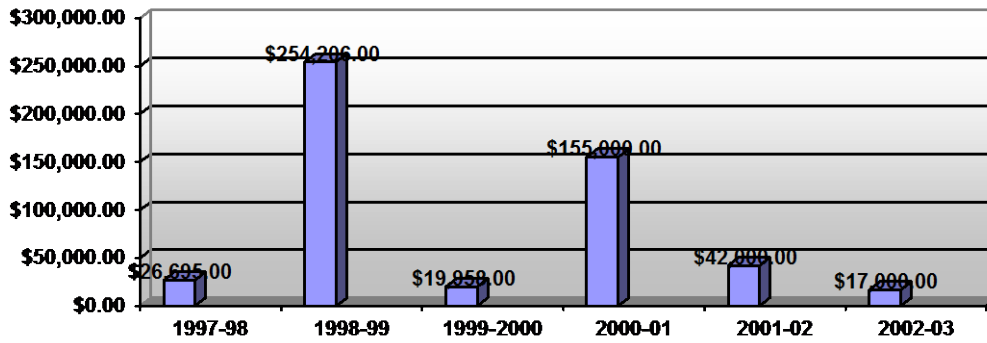
7.22 Number of Grant Proposals Submitted



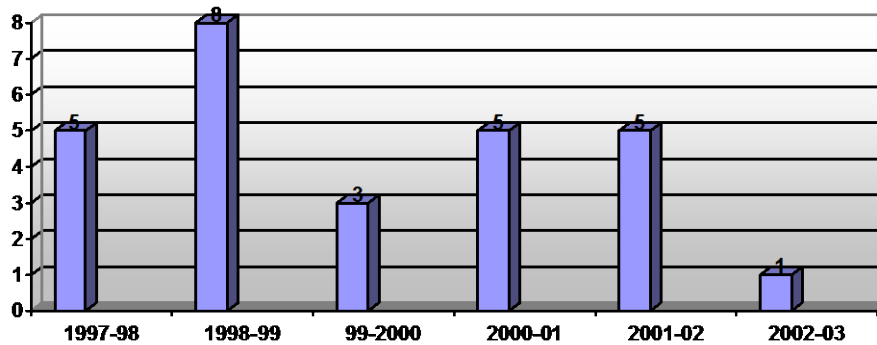
7. 24 Number of Grants Awarded



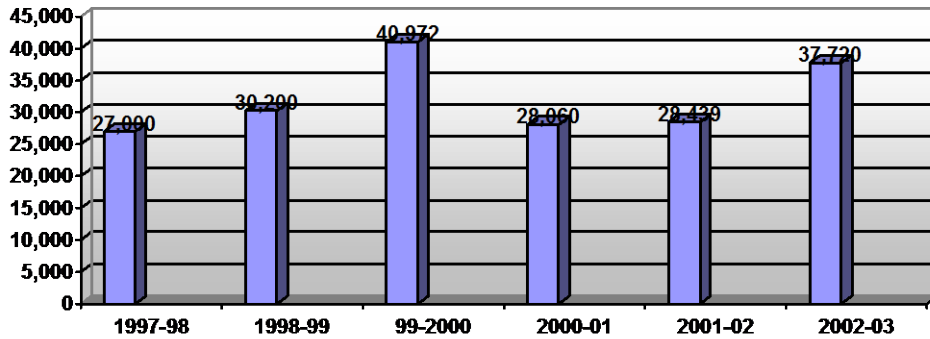
7. 25 Total Funds Awarded



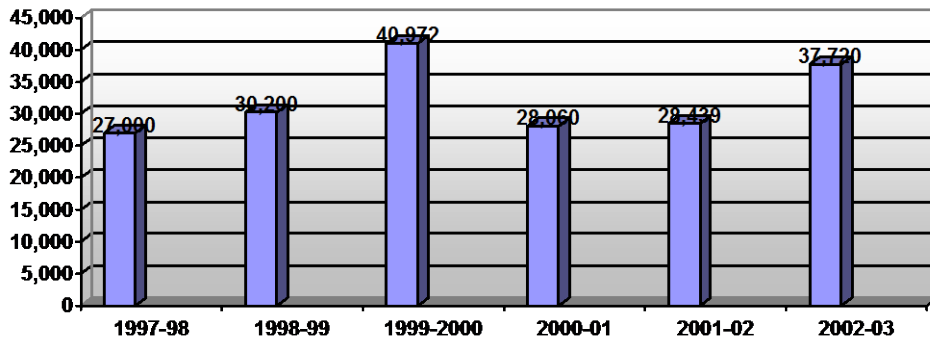
7. 25 Total Funds Awarded



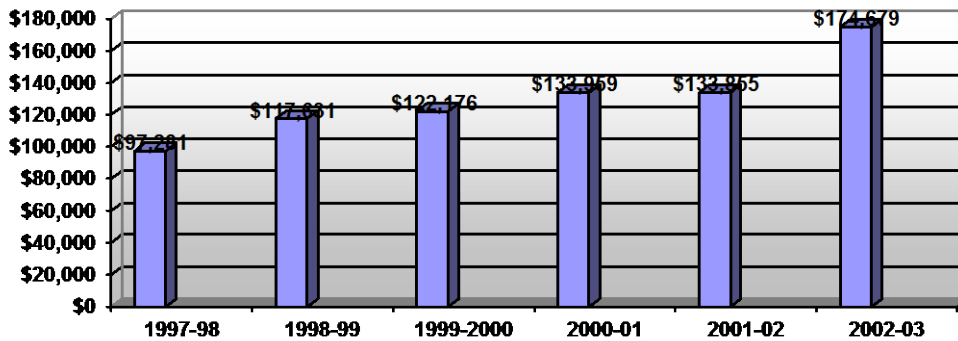
7. 26 Number of Facility Events Scheduled by Customers



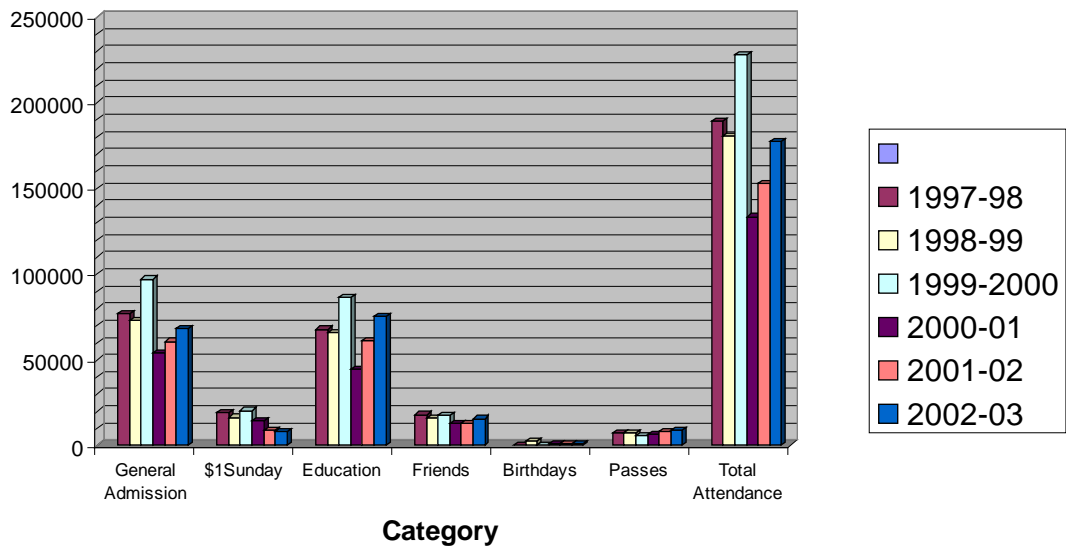
7. 27 Total Attendance at Facility Rental Events



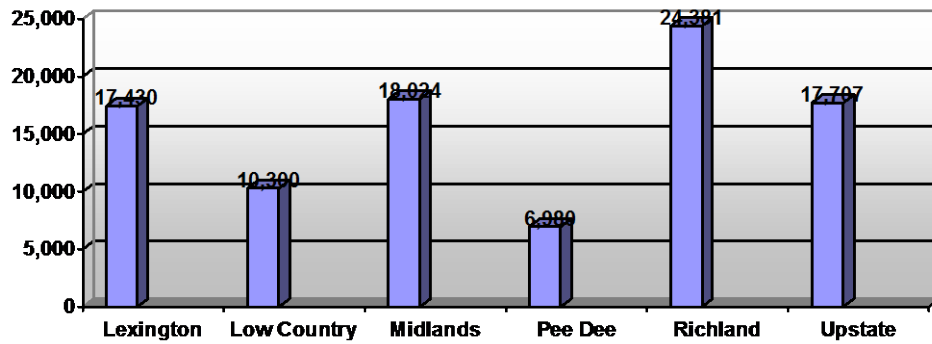
7. 28 Gross Revenues from Facility Rental Program



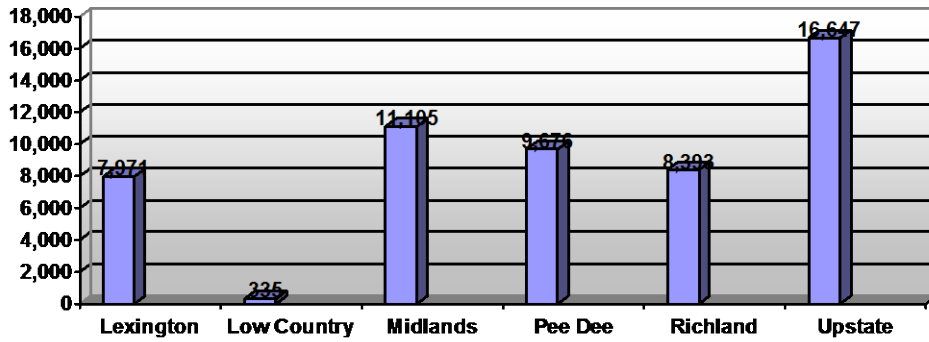
7.29 Visitor Services by Pricing Category



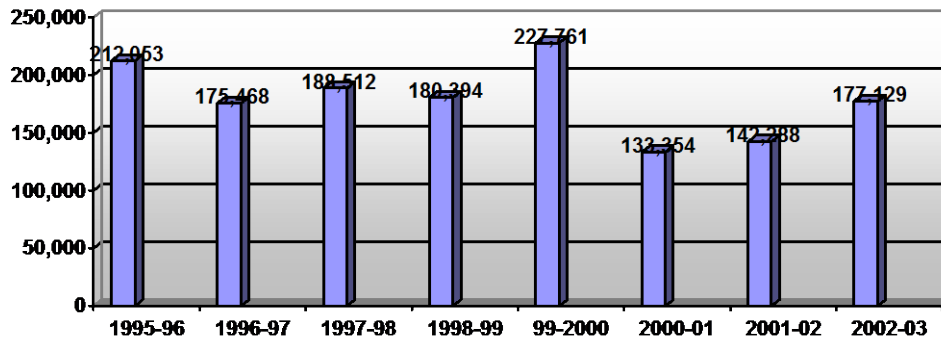
7.29A FY 2003 SC Non-School Geographics by Region



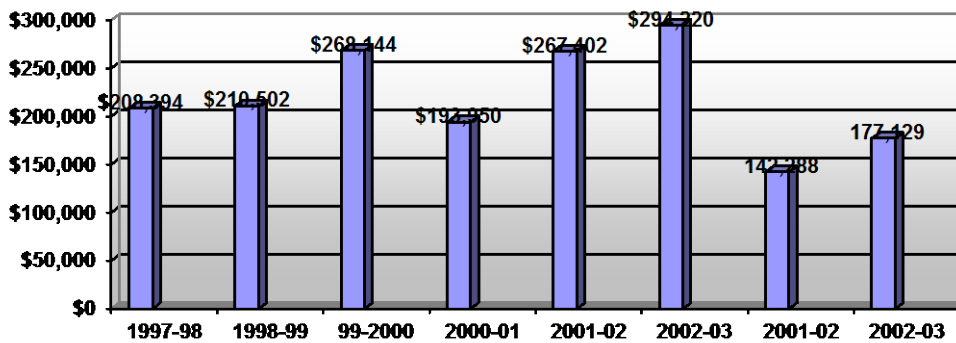
7.29B FY 2003 SC School Geographics by Region



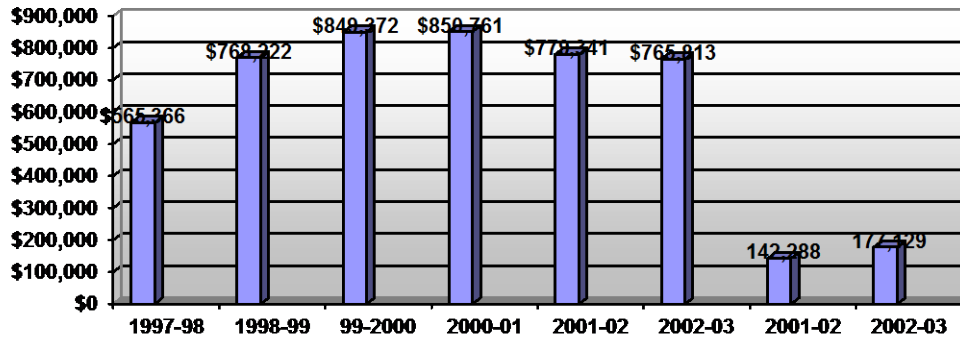
7.30 Annual Attendance Since Museum Opening



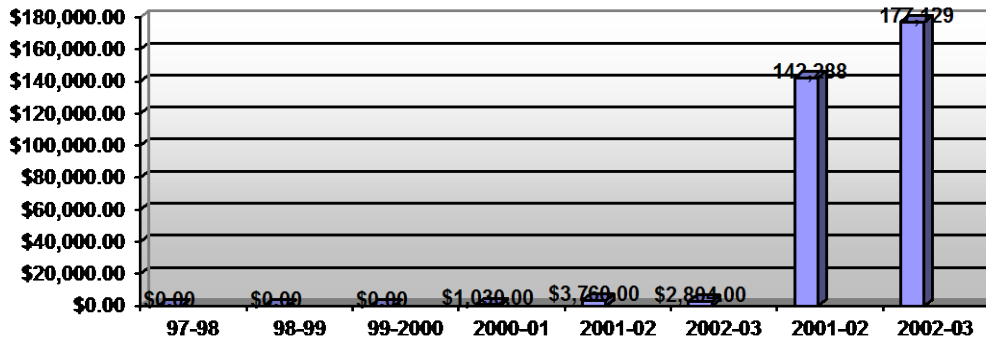
7.31 Admission Fees Collected



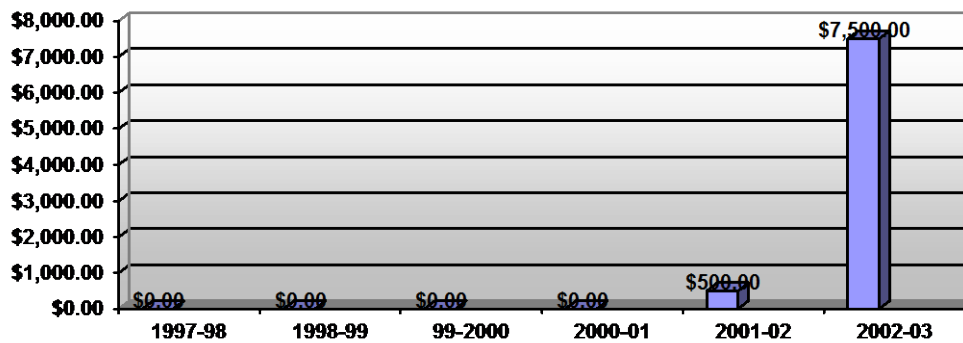
7.32 Gross Sales - Museum Store



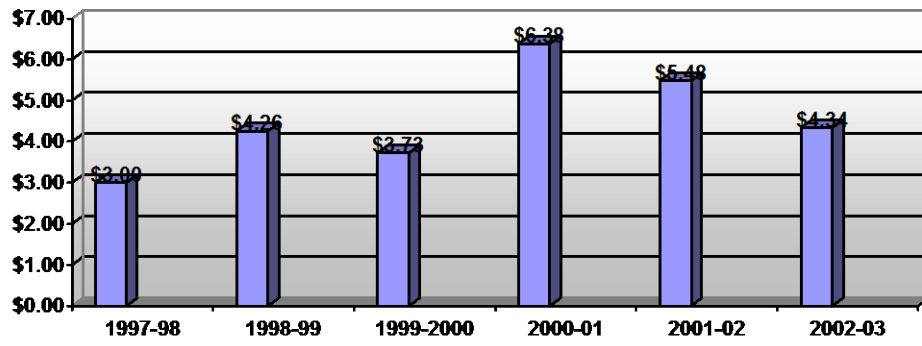
7.32A Museum Store Internet Sales



7.32B Museum Store Off-Site Sales



7.33 Sales Per Visitor - Museum Store



Accountability Report Appropriations/Expenditures Chart Example						
Base Budget Expenditures and Appropriations						
Major Budget Categories	2001-2002		2002-03		2003-2004	
	Actual Expenditures		Actual Expenditures		Appropriations Act	
	Total Funds	General Funds	Total Funds	General Funds	Total Funds	General Funds
Personal Service	2,166,986.00	1,754,070.00	1,728,449.00	1,507,908.00	1,652,758.00	1,475,134.00
Other Operating	4,465,133.00	3,500,610.00	3,930,609.00	2,745,987.00	3,768,383.00	2,813,648.00
Special Items	0.00	0.00	533.00	533.00	0.00	0.00
Permanent Improvements	665,245.00	0.00	103,284.06	0.00	0.00	0.00
Case Services	0.00	0.00	0.00	0.00	0.00	0.00
Distributions to Subdivisions	0.00	0.00	0.00	0.00	0.00	0.00
Fringe Benefits	588,136.00	506,936.00	483,067.00	437,572.00	390,464.00	354,698.00
Non-recurring	0.00	0.00	0.00	0.00	0.00	0.00
Total	\$7,885,500.00	\$5,761,616.00	\$6,245,942.06	\$4,692,000.00	\$5,811,605.00	\$4,643,480.00
Other Expenditures						
Sources of Funds	99-00	00-01				
	Actual Expenditures	Actual Expenditures				
Supplemental Bills						
Capital Reserve Funds						
Bonds						