

Accountability Report Transmittal Form

Agency Name: South Carolina State Museum
Date of Submission: September 15, 2007
Agency Director: William P. Calloway
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I. EXECUTIVE SUMMARY

1. 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.

2. Major Achievements: -

The State Museum is an Accredited museum by the American Association of Museums – only 5% of the museums in the country have such a distinction and honor!

This museum is also sanctioned by the Smithsonian as a Smithsonian Affiliate Museum which is a very distinguished recognition for the quality of the State Museum!

The museum set a record in earned revenue (discounting blockbuster exhibit fees) generating \$1,452,000 which was \$48,000 or 3% over the previous record set in 2004.

The museum was able to successfully receive the final \$2,500,000 from the state for its \$23,000,000 renovation project – OPT- Observatory, Planetarium, and Theater. This brings the total state commitment to \$11.5 million or 50% of the total budget.

The South Carolina Museum Foundation which is the museum's supporting foundation, had a record year as well raising over \$575,000 in private funds for the OPT project. The foundation also contributed close to \$100,000 towards museum exhibits and acquisitions.

The museum had a very successful year as the content was focused to very specific goals and guidelines. The museum's content falls into three prime exhibit areas supported by educational programming:

1) Fee based traveling exhibits

2) Museum generated temporary exhibits

3) Signature events.

This past fiscal year we presented two fee based exhibits which proved very popular. In June 2006, we opened the *Napoleon – An Intimate Portrait* exhibit – the biggest traveling artifact show ever presented at the State Museum. The show ran until January 1, 2007 and generated gross revenues of \$117,186 for the fiscal year; over \$128,000 for the run of the show. The museum tested the market price sensitivity by charging \$8.00 per adult ticket versus the standard \$3.00 or \$5.00. Attendance was over 21,000 but did seem to be slightly deflated due to the pricing structure. In February, we opened *Aliens: World of Possibilities*. We charged the standard \$3.00 per ticket and for the fiscal year generated \$66,000 and

24,000 in attendance. The exhibit was fairly received by the school field trips and was very well received by vacationing spring break and summer tourist visitors.

The staff was busy writing and producing the following 7 exhibits which opened throughout the year in the museum's changing galleries.

Carolina Natural; 100 Years of AAM; Hubble Telescope; Sports Photographs; Yaghjian Retrospective; WWI: the Homefront; and Earth and Space.

The museum put on 9 signature events which including a numerous fall events as well as our annual "Museum Road Show", and Irish and Tartan celebrations.

Educationally the museum continued with a strong performance in 2007. Over 68,000 school children visited the museum representing EVERY county in the state. Lexington and Richland counties combined to provide just over 21,700 school visits. The upstate region once again provided the most school children – over 20,300. Our lowest attended region remains the Pee Dee. School attendance was up 1,000 students from prior year. Also, the museum hosted over 2000 home schooled children as well as some children from surrounding states. The docent and volunteer program at the museum continues to provide quality educational tours to these groups as they visit the facility. We increased our number of volunteers by 26 and the number of hours by 1600 or 16%!! Over 176 volunteers contributed over 11,000 hours to the museum – a value well in excess of \$237,000!

The retail store experienced significant growth of 7% or \$47,800 in spite of flat attendance. Our food service revenues continued to climb with sales of over \$125,000; a 5% increase. Our facility rental program continues to be a shining star with yet another record year with revenues of \$253,000; a \$100,000 increase in 5 years!!

Expenses were in line with budgeted expectations in spite of another unexpected 13% or \$154,000 increase in our operating rent from the B&CB. **The last two years of the lease; the B&CB raised our rent an unbelievable 50% or \$429,000!!!** The rent obligation to the museum continues to consume over 65% of our appropriated monies. Even still, our cost per visitor remained low at \$32 per visitor which is in line with AAM bench marks.

Using carry forward earned revenue, the museum also invested back into the facility. The museum changed its out of date Retail POS system which will eventually be the same system that we will convert our ticketing and visitation software to. We also hired a web designer to totally revamped the museum's antiquated web site. The firm completed about 50% of its work by fiscal year end with an expected launch date of late fall 2007. We also developed an RFP in an effort to outsource our food service operations. Unfortunately, we were unsuccessful in finding a vendor and will amend the RFP and re-issue in the next fiscal year.

We received \$200,000 in artifact acquisition funding from the state. As a result, the museum had 14 acquisitions that totaled \$32,000. We had a total of 81 accessions of 577 objects that were added to our collection. A number of the collections were donation made by private individuals.

The museum made a concentrated effort to increase its partners. Continued progress was made with ETV as the museum provided content and assistance to many programs. The museum successfully lobbied the City of Columbia, Lexington County, and Richland County and received over \$183,000 in hospitality and accommodations taxes. We also received \$20,000 from the city of Forest Acres hospitality taxes. As a result, 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. Other partners included PRT and the local CVB as well as other Columbia attractions. We continued the partnership with "Mad Science" with whom we outsourced our summer camp programming.

Attendance breakdown

<i>Core Market</i>	47%
<i>Rest of South Carolina</i>	46%
<i>Georgia/North Carolina</i>	3%
<i>All other States</i>	4%

We had visitor from all 50 states and 11 foreign countries!!!

A sampling of the results:

Attendance	142,000
Educational Visits	68,000
Store Revenues	UP \$48,000; Over \$100,000 increase in two years.
Rental Income	\$253,000 NEW RECORD!!
Food Service Revenues	\$125,000 NEW RECORD!!

A Sampling of Some of the Accomplishments in 2006-2007:

OPERATIONS

The Cotton Mill Exchange exceeded the sales plan of \$700,000 by 7.7% with sales of \$754,092 which was 6.8% over the prior year. The store sales per cap rose to \$5.33 which exceeded prior year per cap of \$4.82. Food service sales exceeded plan of \$120,000 by 4.3% with total sales of \$125,108 which included a record \$43,131 of in-house catering sales. Facility Events increased rentals 10% over prior year with sales of \$253,237. The store, café, and facility rentals sales performance was impressive considering the museum's attendance dropped 3% from 2005/2006.

There were numerous Marketing and Public Relations achievements and opportunities reached by the division during 2006-07. They included obtaining media sponsorships for major exhibits, obtaining marketing funds from the city of Columbia's two funds (A & H taxes) for marketing Columbia, plus obtaining funds from Richland County, and partnering with the area's other attractions. FY 06-07 continued to see new money granted to market the museum, as the museum received a total of \$183,000.

During FY '06-'07, the Exhibits, Building Services and Public Safety Department provided dismantling assistance, then repaired/repainted, designed, maintained and/or installed and provided security for 14 changing exhibits, 4 smaller displays, and one off site exhibit. Continued with the setup and cleaning responsibility of the school kids eating area in the Congaree Room, the upper Atrium, and the Cafe.

PROGRAMS and EDUCATION

The Programs Department presented a variety of programs and events during FY 06-07. An average of 10 exhibit-related and subject area programs per month were offered. Nine annual signature events were presented. The Facility Events program earned **\$235,524** from **347** rental events. The Traveling Exhibits Program earned **\$8,513** from **47** exhibit rentals

Over 67,000 students and teachers participated in educational experiences through outreach and on-site programming. Blockbuster exhibits, *NAPOLÉON An Intimate Portrait* and *Aliens: World of Possibilities*, were well attended. The blockbuster exhibits were accompanied by standards-based lessons, developed in-house and delivered by trained staff members and volunteers.

Camp-In program attendance was impacted by state-wide realignment of the Girl Scouts organization. A Public Camp-In was held during the spring in an effort to generate additional attendance and meet revenue projections. The Education Department benefited from new partnerships which resulted in new program

offerings for museum guests including Space Ag in the Classroom presented during Homeschool Friday. Standards-based programs museums were also developed for each new exhibit and blockbuster.

StarLab income was \$9,654 this year as 5,118 students and 393 adults viewed programs. Curator and Education staff performed approximately 100 outreach functions this year. The work was statewide and beyond state boundaries and included public talks, formal presentations, consulting and partnering.

NATURAL HISTORY

The backlog of plaster jackets from the Camelot dig have been finished and much of the cataloging and marking of the Camelot fossils has been completed. Several graduate students have worked on various subjects in the Natural History collection, as have several outside researchers both at the State Museum and by loaning specimens. A peer-reviewed journal paper was published by the Chief Curator, and a number of other papers are in preparation. Volunteers have picked literally thousands of specimens from matrix concentrate and these specimens will be one focus of the next year's effort. A number of specimens are being loaned to other museums to support exhibit efforts at those facilities. The Chief Curator attended a professional meeting and presented a paper based on his research. A Natural History exhibit, "Carolina Natural," has been up for most of the year, highlighting some of the premier specimens of the Natural History collection. Other exhibits are in various stages of planning, as is a rework of portions of the Natural History permanent exhibit space. A number of significant collections were taken into the collection, including a superlative specimen of a fossil leatherback turtle.

CULTURAL HISTORY

A number of large and small exhibits have been undertaken by Cultural History. "Century of Sports," "Seeds of Change: South Carolina and the Great War," "Tribute to James Brown," "Treasures by the Hundreds: 100 Years of the American Association of Museums," and a short exhibit on Girl Scouts were produced. The two curators attended a number of professional meeting and delivered several professional papers based on their research. Numerous artifacts were brought into the collection, including a number of significant items representing the African-American community, significant military items including a World War II flying suit, and some materials for the upcoming TET exhibit.

SCIENCE AND TECHNOLOGY

It has been a busy year for the Science and Technology Chief Curator as, in addition to his curation duties he has served as Director of Education. Even though wearing two hats he has managed to install two large exhibits, "Earthand Space," and "Hubble Space Telescope: New Views of the Universe." He has collected a number of Science and Technology related objects, including various pieces of photographic equipment, communications equipment, and, in support of the OPT project, has continued to work on the Robert Arial library and telescope collection. He has also attended numerous conferences and meetings establishing contacts with a large number of disciplines that will be significant to the future of the State Museum, including nanotechnology and fuel-cell research efforts..

ART

The Art Department has been busy as usual this year with a full exhibit schedule and ongoing collecting for the permanent collection. The major focus of effort has, however, been *Edmund Yaghjian: A Retrospective*, covering over 50 years of paintings and drawings by one of South Carolina's most influential artists, community activists, and university professors. A full-color, 80-page hardback catalog was generated to support the exhibit. This exhibit also included self-guided cell phone tours, a first for South Carolina. Additionally, the Chief Curator oversaw a face-lift of the Education Hallway leading to the Lipscomb Gallery, where a micro exhibit promoting the upcoming Mark Coplan Collection Exhibit to be installed in October, 2007, in addition to works by Guy Lipscomb and a Clay Rice plasma-cut-steel silhouette.

REGISTRATION

The Chief Registrar has, in addition to her regular duties, attended several professional meetings representing the State Museum. As a member of the executive board of the South Carolina Federation of Museums, she attended quarterly meetings and is part of the planning team for the annual meeting. As the South Carolina representative to the Southeastern Museum Conference she attended the mid-year and annual meetings of that organization in Knoxville, Tennessee, and collates information from around South Carolina for the quarterly newsletter, *Inside SEMC*. Her usual registration duties of marking and handling paperwork for the various collections are ongoing, and she has assisted all of the exhibits prepared by the Collections Staff.

ADMINISTRATION

FY07 was another busy year for the Museum and despite a continual increase in workload, no additional staff was added. State funding increased which included \$5M for the OPT project and \$5M in pass-thru funds. Our Procurement Manager and Foundation/Museum Accountant, both hired in FY06, spent the year familiarizing themselves with daily operations. FY07 emphasized new software Development/implementation. Gateway was awarded the RFP for a new Point-of-Sale system and installation has been completed. SCEIS, new state-wide administrative system, remains a high priority for the State—the Museum is slotted for early Spring 2008 implementation. Progress continues on reconciling old Federal Grants—only two remaining.

3. Key Strategic Goals:

The key current and long term goal 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 Comprehensive Goals Include:

- Increasing attendance and revenues in order to become more self-sustaining and to self-fund desperately needed core improvements and renovations to the permanent exhibit.
- Increasing citizen, corporate, and foundation private financial support for the museum including increasing the corporate, family, and individual membership base.
- Build, preserve and use collections of distinction.
- To improve exhibits, educational programs and public programs.
- To provide assistance to the statewide museum community and to forge strategic alliances and partnerships that will magnify the museum’s ability to provide benefits to the public.
- Provide facilities and technology that meet customer expectations, museum standards and programming needs.
- To secure a growing and diverse funding base to meet operational needs and to enable the museum to fulfill its vision of an ever-changing institution that is a model among museums nationally.
- Recapitalization and Renovation

Key Specific Goals:

Operations

- Increase General Admissions and Pre-Formed Group Attendance
- Retention of Marketing Firm to Develop Integrated Plan
- Maximize NEW Web Site to Drive Attendance and Transactions
- Integration of New Organizational Structure
- Maximize Revenue Potential of Food Service
- Maximize Partnerships with DOE and ETV.
- Negotiate a Favorable Lease Arrangement with B&CB; 2008 and beyond

OPT

- Finalizing OPT Design
- Supporting Private Fund Raising Efforts for OPT
- Reconcile Construction Oversight Issue with B&CB

20 Year Old Facility

- Renovation of Permanent Exhibits
- Combating Competition that is more Current and Appealing
- Remodel of Guest Service Facilities such as Store and Ticketing

4. Opportunities & Barriers:

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

Opportunities:

- Increasing Private Contributions
- 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 temporary concessions, photo opportunity, audio tours, and preferred catering.
- Establishment of a beneficial relationship with the Edventure children's museum and all other Columbia attractions.
- Use of our Retail expertise to form beneficial financial partnerships with other organizations.
- Creation of marketing partnerships that stretch limited advertising funds.
- Writing more operational grants to help fund special needs.
- Retooling existing permanent exhibits to bring back their vitality.
- Continued 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 pre-formed groups to visit.
- Continued planning and development of the OPT Project. This will add an observatory, planetarium and interactive 4-D theater to the museum, substantially enhancing our commitment to education in South Carolina and making the museum a major center for science education in the Southeast.

Barriers:

- The huge rent financial obligation of over \$3,000,000/year, which makes up 66% of our base appropriation.
- The operation of a current, competitive facility in the parking lot.
- Sourcing and creating impactful exhibits with limited funds
- Finding cooperative partners for funding in a tight economy.
- Competition for once exclusive retail product
- 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.
- Acquiring funding sources for needed facelift of exhibits.
- The continued transition of agency senior management 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 is 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. 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) and the Museum Café (Crescent Café)
- Facility Use Rental
- Fabrication of Exhibits and Graphic Panels for third parties.
- Consultation, assistance & training for other (local) museums/institutions

2. 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

Requirements and Expectations-

- Quality, current, competitive exhibits of excellence
- Entertaining, Educational, Interactive experiences
- Programs that are unique, tell stories and inform
- Family friendly
- Curriculum that adheres to educational standards
- Outstanding Guest Service
- Outstanding value for time and dollars expended

3. Key Stakeholders

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

4. Key Suppliers and Partners:

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
- ETV and State Archives and History
- Columbia Attractions – Zoo, Art Museum, Edventure, Historic Columbia
- City of Columbia and Forest Acres
- Richland and Lexington Counties
- Media Providers – Print, Outdoor, Radio, Broadcast, Cable

5. Operation Location:

The State Museum is located in the Columbia Mills Building at 301 Gervais Street in Columbia, South Carolina. The State Museum also travels across the State to participate in retail markets in an effort to generate additional earned revenue as well as build outer market awareness. Additionally, the museum has a portable planetarium (Star Lab) that is taken offsite to schools for astronomy programming.

6. # of Employees:

- Authorized Full-time Positions (FTE's): 44 (Includes Unclassified Executive Director)
- Un-Classified 1
- Positions Filled as of 06/30/07 36.5
- Positions Vacant as of 06/30/07 6.5
- # of Part-time positions as of 06/30/07 55
- Grant Funded 3.5

7. Regulatory Environment

Section 60-13-10

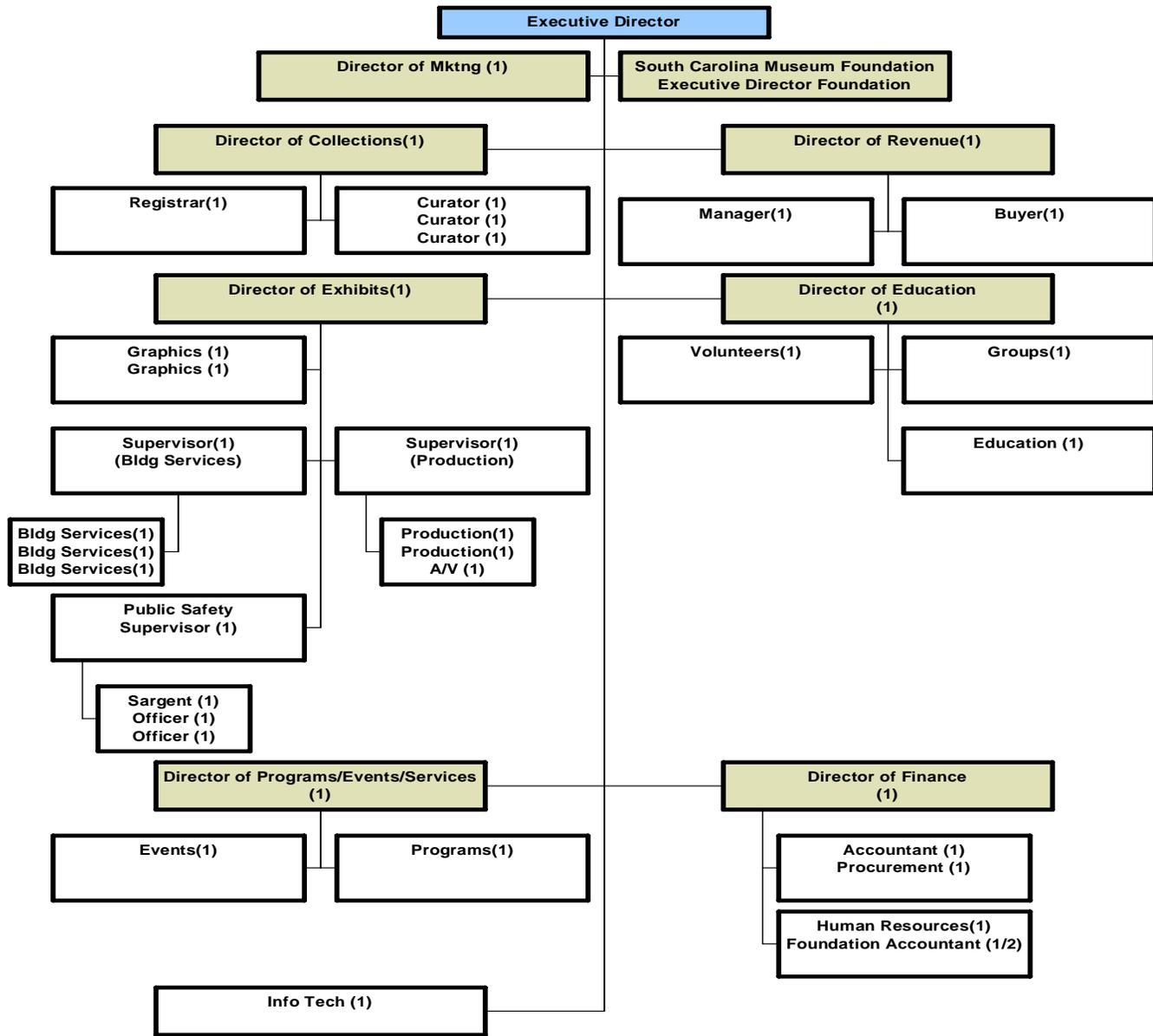
8. Key Strategic Challenges

- Finalize Funding of OPT capital renovation project
- Rent/Lease burden – 65% of state appropriation
- Private Funding Support
- 20 year old, dated facility and exhibits

9. Performance Improvement Systems

- EPMS
- Departmental Business Plan development
- Goal setting – quantitative and qualitative
- Weekly Director Meetings and Bi-annual plan reviews with peers.
- Visitor and User Feedback
- Stakeholder feedback

10. Organizational Chart:



11. Expenditure/Appropriations Chart

Accountability Report Appropriations/Expenditures Chart

Base Budget Expenditures and Appropriations

Major Budget Categories	FY 05-06 Actual Expenditures		FY 06-07 Actual Expenditures		FY 07-08 Appropriations Act	
	Total Funds	General Funds	Total Funds	General Funds	Total Funds	General Funds
Personal Service	\$ 1,704,820	\$ 1,453,139	\$ 1,764,277	\$ 1,480,083	\$ 1,868,916	\$1,618,337
Other Operating	\$ 4,249,139	\$ 2,745,645	\$ 4,645,171	\$ 2,950,852	\$ 4,432,333	\$3,220,641
Special Items			\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000
Permanent Improvements	\$ 3,500		\$ 40,228			
Case Services						
Distributions to Subdivisions						
Fringe Benefits	\$ 444,803	\$ 383,064	\$ 488,741	\$ 419,572	\$ 519,257	\$ 451,528
Non-recurring	\$ 105,349	\$ 15,910				
Total	\$ 6,507,611	\$ 4,597,758	\$ 6,963,417	\$ 4,875,507	\$ 6,845,506	\$5,315,506

Other Expenditures

Sources of Funds	FY 05-06 Actual Expenditures	FY 06-07 Actual Expenditures
Supplemental Bills		\$ 9,532,329
Capital Reserve Funds	\$ 1,200,000	
Bonds		
Lottery		\$ 500,000

Major Program Areas

Program Number and Title	Major Program Area Purpose (Brief)	FY 05-06 Budget Expenditures	FY 06-07 Budget Expenditures	Key Cross References for Financial Results*
IB - Guest Services, IIIC - Benefits	Operation of Admissions, the Gift Shop, Food Service, and other resell opportunities.	State: 0.00 Federal: 0.00 Other: 1,029,460.00 Total: 1,029,460.00 % of Operating Budget: 28%	State: - Federal: Other: 929,224.00 Total: 929,224.00 % of Total Budget: 25%	7.20 - 7.29, 7.50 - 7.51, 7.3 - 7.31
IIA - Collections, IIIC - Benefits	Responsible for the collecting, preserving, storing, interpreting, and exhibiting the specimens/artifacts that represent South Carolina's past, present and future	State: 278,786.00 Federal: 14,996.00 Other: 68,913.00 Total: 362,695.00 % of Operating Budget: 10%	State: 308,337.00 Federal: 51,372.00 Other: 10,955.00 Total: 370,664.00 % of Total Budget: 10%	7.80 - 7.83, 7.50 - 7.51
IIB - Exhibits, IIIC - Benefits	Responsible for the fabrication and upkeep of exhibits, public safety, building services, and graphic design which includes departmental support.	State: 779,453.00 Federal: 0.00 Other: 133,831.00 Total: 913,284.00 % of Operating Budget: 24%	State: 790,462.00 Federal: Other: 97,027.00 Total: 887,489.00 % of Total Budget: 24%	7.40 - 7.44, 7.50 - 7.51
IIC - Education, IIIC - Benefits	To fulfill the educational mission by providing quality learning experiences for the visitors as well as responsibility for managing group reservations and volunteers/docents.	State: 199,027.00 Federal: 0.00 Other: 28,846.00 Total: 227,873.00 % of Operating Budget: 6%	State: 192,796.00 Federal: 900.00 Other: 29,122.00 Total: 222,818.00 % of Total Budget: 6%	7.70 - 7.74, 7.50 - 7.56, 7.61
IIE - Programs, IIIC - Benefits	To present educational, entertaining, and impactful exhibit and thematic related programs and events as well as managing the facility rental program.	State: 176,917.00 Federal: 0.00 Other: 28,261.00 Total: 205,178.00 % of Operating Budget: 5%	State: 180,105.00 Federal: Other: 32,702.00 Total: 212,807.00 % of Total Budget: 6%	7.30, 7.32-7.33, 7.50 - 7.51
IIF - Marketing, IIIC - Benefits	To generate attendance at the museum and its events through publicity and paid advertising as well as performing public relations in the community and State.	State: 19,614.00 Federal: 0.00 Other: 382,171.00 Total: 401,785.00 % of Operating Budget: 11%	State: 24,862.00 Federal: Other: 436,478.00 Total: 461,340.00 % of Total Budget: 12%	7.10 - 7.14, 7.60 - 7.61, 7.50 - 7.51

Below: List any programs not included above and show the remainder of expenditures by source of funds.

Remainder of Expenditures:	State: 580,197.00	State: 607,314.00
IA - Administration, IIIC - Benefits	Federal: 0.00	Federal:
Finance, IT, Executive Director, and Human Resources as well as agency wide overhead such as paper, copiers, etc.	Other: 11,151.00	Other: 24,269.00
	Total: 591,348.00	Total: 631,583.00
	% of Operating Budget: 16%	% of Total Budget: 17%
Sub-Total Operating w/o Bond and Rent	3,731,623.00	3,715,925.00
	57%	54%
Rent and Bond Payments	State: 2,567,266.00	State: 2,746,630.00
	Federal:	Federal:
	Other: 208,723.00	Other: 435,633.00
	Total: 2,775,989.00	Total: 3,182,263.00
	% of Total Budget: 43%	% of Total Budget: 46%
Total Budget	6,507,612.00	6,898,188.00

* Key Cross-References are a link to the Category 7 - Business Results

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.

Each year the department directors are responsible for developing a business plan for their area. The draft plans are presented to the Executive Director in one on one sessions. After writing revisions, the department plans are then presented by each director to the other directors in a day long work session. From that input, the directors then draft their final plan which is once more submitted to the Executive Director for final approval.

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 are what measurement tools are used to determine successful outcomes. This process begins in June and is completed 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 as the staff, through the direction of the Executive Director, now refers to the visitors of the museum as "Guests" versus customers.

1.3

The museum initiates new exhibits and programs based on a review of the stakeholder expectations and a gap analysis. The impact is measured through participation, attendance, and support which could be financial, in-kind, or participatory. Risks are evaluated by senior management and in borderline or suspect instances the Executive Director will review his decision with the trustees prior to implementing.

1.4

The Executive Director in conjunction with the Finance Director and the Human Resource Manager are the prime staff members whose responsibility includes maintaining fiscal, legal, and regulatory responsibility. The Annual Audit process in itself is a great tool that is used to discover and verify procedures and compliance. First during the audit itself, just the discovery process of producing documents and answering questions reveals potential issues. Secondly, when the actual audit report is received some months later, it once again provides us with the third party overview and review of potential issues. The museum also relies heavily on the staff of the B&CB to answer questions and provide guidance when there is a question. The HR Manager and the Controller regularly contact staff at OHR, the AG's office, the CG's office, and the Budget Office to insure the museum is following proper protocol.

1.5

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

1.6

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

1.7

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.

1.8

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.

1.9

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 its 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

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 museum will redo the long term plan during this current fiscal year (2006).

2.2

Strategic Objectives – See Chart

2.3

The directors meet with the Executive Director on a continual basis to review and adjust their work plans 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.

2.4

Action Plan – See Chart

2.5

Communication of the strategic plans are handled as referenced in category 1.1 ie

Monthly staff meetings, weekly director meetings, quarterly half day topic driven director meetings, trustee meetings, etc.

2.6

see 2.3

Strategic Planning

Program Number and Title	Supported Agency Strategic Planning Goal/Objective	Related FY 06-07 Key Agency Action Plan/Initiative(s)	Key Cross References for Performance Measures*
IB - Guest Services, IIIC - Benefits	The goals of the Revenue Generating Department are to grow store sales, maximize sales in the the food service area, generate new revenue streams, and enhance the museum guest's visit. MAXimization of the new the store software and hiring and training new staff are additional goals.	Participate in more profitable off-site one day sales events; Develop exclusive merchandise for the store; initiate new catering food operation; Retain a visual merchandiser to enhance appearance and sales; Develop a store buy plan by category and by month; Maximize sales on the new web site and continued partnership with SC Interactive; Incorporate rental program department and staff into revenue division.	7.20 - 7.29, 7.50 - 7.51, 7.30 - 7.31
IIA - Collections, IIIC - Benefits	The staff of the Collections Department will actively pursue collections and, once collected, their safe-keeping, allowing for enhanced exhibit possibilities. All the while the Collections Staff will continue to develop their professional standings in their respective professional communities.	Focus acquisitions on needs for Civil War exhibit expansion, Develop and write story lines for new Exhibits for the changing Galleries. Register/catalog specimens/artifacts in a timely manner. Reorganize curator responsibilities to include overseeing of conservation of new acquisitions. Find a partner to utilize conservation area. Develop storage plan to efficiently utilized new \$25,000 appropriation. Write and submit one scholarly, peer-reviewed paper per discipline. Finalize the collecting plan by discipline and by identifying collection gaps.	7.80 - 7.82, 7.50 - 7.51
IIB - Exhibits, IIIC - Benefits	The goals of the Exhibits, Building Services, and Public Safety Department are to continue to provide agency-wide design services including WEB; traveling exhibit rental handling, exhibit production, installation & maintenance; custodial services & Facility Use support; and building, staff & collection security and public safety oversight.	Develop and produce in-house blockbuster exhibit based on the movie industry in South Carolina. Revitalize the TEP program by producing at least one new traveling exhibit and supporting collateral material. Develop process for achieving schedule deadlines and budget for new exhibits. Maximize partnerships with outside groups by seeking support for new exhibits. Add engaging & attractive exhibit elements to permanent and changing galleries. Provide support for revenue operation to insure maximization of revenues. Aid in the redevelopment of the agencies web site. Insure newly installed exhibits are appealing to the market.	7.40 - 7.44, 7.50 - 7.51
IIC - Education, IIIC - Benefits	The goals of the Education Department are to provide a statewide education presence in the form of on-site and outreach programs. The museum must maintain the education point of difference with programming by providing free standards-based educational experiences for South Carolina students. In addition, the museum must provide high quality programs for special interest groups and the general public to increase attendance and revenue.	Provide and serve the education community with resources and programs to assist teachers to meet curriculum standards. Provide guests "added value" experiences in Nature Space on weekends and holidays. Develop a marketing plan to increase attendance and revenue with camp-ins, birthday parties and special programs. Recruit and train additional (20) volunteers to assist with a variety of vital functions. Develop a volunteer "characters in costume" interpretive program. Increase partnerships between the museum and the educational community such ETV. Manage Group Visits area to operate more smoothly and efficiently. Continue to adapt curriculum to current DOE needs such as Math and Science. Initiate "touch cart" weekend programs.	7.70 - 7.74, 7.50 - 7.56, 7.61
IIE - Programs, IIIC - Benefits	The goals of the Programs Department are to increase attendance and revenue through programs and events, rentals of museum spaces and bookings of traveling exhibits and to continue enhancement and development of signature events.	Work closer with the Marketing Department to create event specific marketing plans for each signature event. Aggressively market the museum's rental spaces by hosting meeting planner events and through incentives. Implement preferred catering for museum rental events. Generate revenue by offering programs that require registration fees and by collecting fees from resell users. Secure funding from granting organizations to sponsor Public Programs. Market the Traveling Exhibition Program through production and distribution of a promotional brochure. Source new provider for outsourcing of summer programs. Work closer with the Foundation's membership manager to maximize participation in signature events.	7.30, 7.50 - 7.51, 7.32 - 7.33

Program Number and Title	Supported Agency Strategic Planning Goal/Objective	Related FY 06-07 Key Agency Action Plan/Initiative(s)	Key Cross References for Performance Measures*
IIF - Marketing, IIIC - Benefits	The goals of the marketing department include increasing public attendance; obtaining media sponsorships for blockbuster exhibits; partnering with CVB, Lake Murray, etc. to promote the museum along with the city of Columbia; to acquire Accommodations & Hospitality Tax grants from the City of Columbia and Richland and Lexington Counties; to perform audience research; and to develop a marketing relationship with identified corporate sponsors.	Overseeing transition of web site to an interactive, transaction capable marketing site that drive attendance, participation, and revenues. Obtain media sponsorships for new exhibits. Increase group sales through direct marketing including e-mail and ticket consignment. Partner with CVB and PRT to create specific plans to promote and package the museum. Obtain Accommodations and Hospitality Tax grants. Perform audience research to determine product and communication gaps. Develop corporate marketing sponsorships specifically targeting grocery and beverage categories. Develop and "underserved" group ticket program.	7.10 - 7.14, 7.60 - 7.61, 7.50 - 7.51

Category 3 – Customer and Market Focus

3.1-5

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 – Measurement, Analysis, and Knowledge Management

4.1,3,4,5

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 compile 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.

4.2 Key Measures:

- Attendance
- Earned Revenue
- Programs Presented
- Exhibits Presented
- Costs per Visitor
- Statewide Visitation
- School Visitation
- Artifacts Collected

4.6 Retention of Organizational Knowledge

Weekly director planning/update meetings requires that each of the seven directors listen and provide input to each other reports so they understand the priorities of each department. Business plans are presented internally for review and comment before finalization. As a result, this forced communication of each department goals and objectives results in a cross trained management staff. Each director then has smaller internal meetings where again the info is communicated. No one performs in a vacuum.

Category 5 – Human Resources Focus

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 Christmas Party, 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.
6. 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. The State Museum also participates in the annual United Way fund raising campaign in the community as well as Breast Cancer Awareness.

Category 6 – Process Management

6.1 Customer Processes- Processes required for delivering mission and value to the customers through direct and non-direct interaction.

- Ticket Sales
- Store Sales
- Food Sales
- Program Presentation
- Curriculum Presentation
- Operation of Exhibits
- Development of Exhibits
- Development of Programs
- Purchasing of Retail Product
- Safety of Guests
- Security of Collection
- Cleanliness of Building
- Operation of Rental Program
- Booking of Groups, Events, and Programs
- Marketing
- Graphic Design
- Exhibit Fabrication

6.4 Support Processes – Processes where the museum interacts internally.

- Human Resource Management
- Off Hour Security
- Accounting
- Procurement
- Software and Hardware Management and Data Processing
- Employee Relations

6.5 Partner Processes – Processes where the museum interacts with third party partners.

- Purchases
- Contracts
- MOU
- Meetings
- Direct Contact
- Grant Request
- Cooperative Programming and Marketing

Monitoring –

6.3 Effectiveness –

The museum measures effectiveness with the customers using primarily the same key success measures as outlined in section 4.2. Internally, employee satisfaction as gauged by turnover, conflict, and participation demonstrate the effectiveness of our internal programs. With external third parties, the quality of the relationship as demonstrated by respectful interaction with functional and mutually productive output for both parties

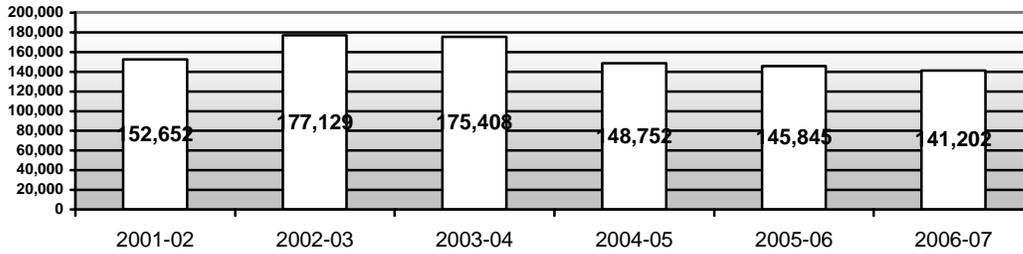
6.2 Changes –

The museum as it competes in the open market for visitor's discretionary time and income is constantly monitoring performance and results and making necessary improvements. The operation of the museum is fluid in that there are not starting and stopping periods so we must continually change as we best determine based not only on staff initiative but in reaction to the realities of a competitive market. Again, weekly director meetings, weekly department meetings, and monthly general staff meetings are very effective in communicating and broadcasting the changes needed and the rationale behind those changes.

Business Results:

7.1 Attendance Measures

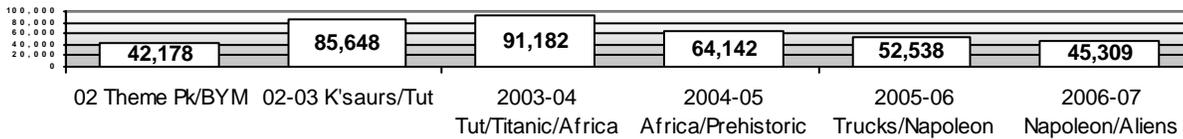
7.10 Annual Attendance Since Museum Opening



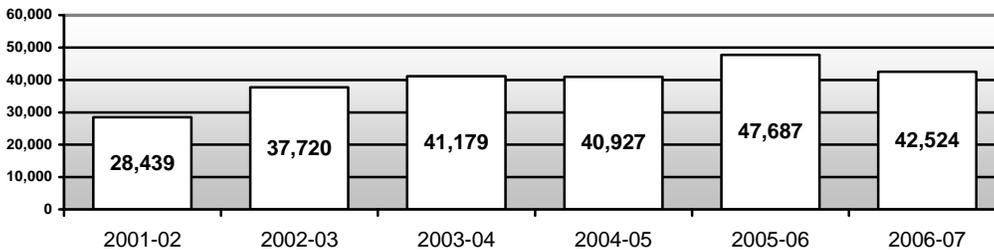
7.11 Guest Services by Pricing Category

	2002-03	2003-04	2004-05	2005-06	2006-07
General					
Admissions	85,648	73,810	53,437	56,225	48,726
\$1 Sunday	7,250	7,830	7,639	6,492	6,882
Education	70,200	74,921	71,909	67,145	68,095
Friends	8,500	12,244	10,179	11,169	13,072
Birthday's	695	423	294	365	312
Passes	4,836	6,180	5,294	4,449	4,115
Total					
Attendance	177,129	175,408	148,752	145,845	141,202

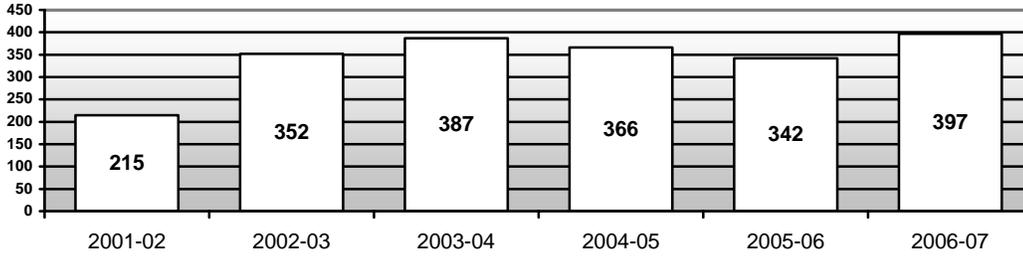
7.12 Attendance for Special Attractions



7.13 Total Attendance at Facility Rental Events

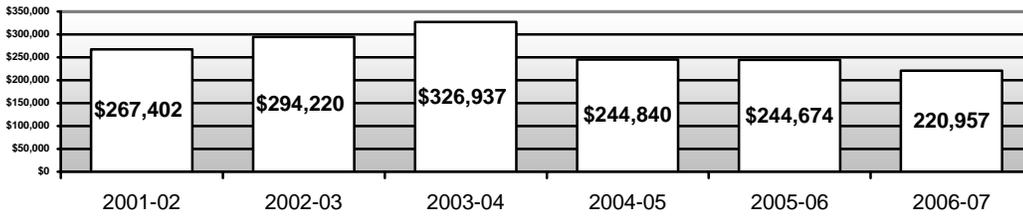


7.14 Number of Facility Events Scheduled by Clients

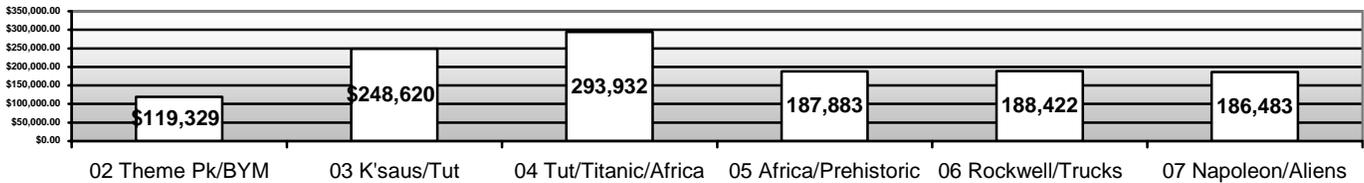


7.2 Revenue Measures

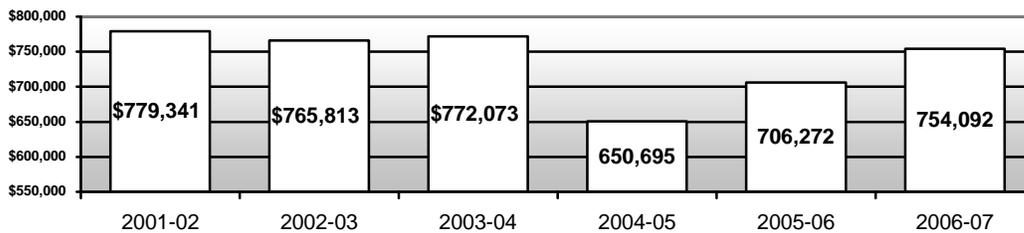
7.20 Admission Fees Collected



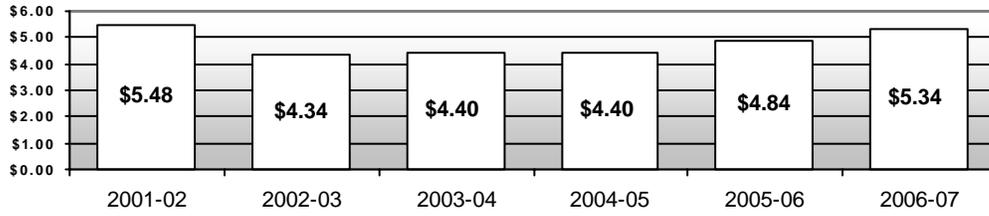
7.21 Gross Revenue-Special Attractions



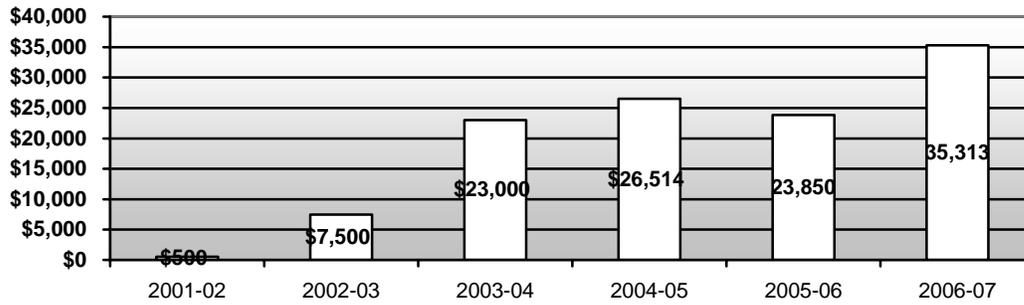
7.22 Gross Sales - Museum Store



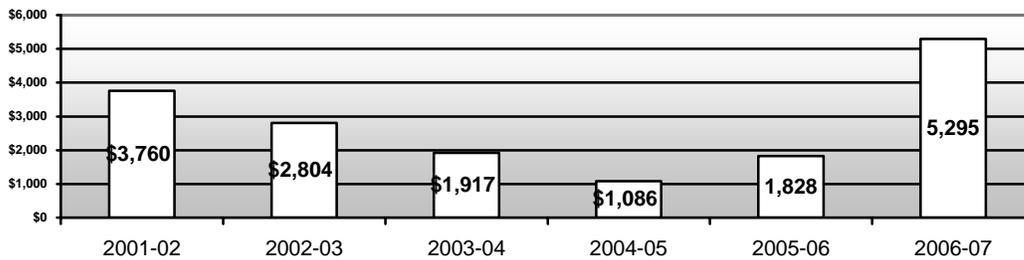
7.23 Sales Per Visitor - Museum Store



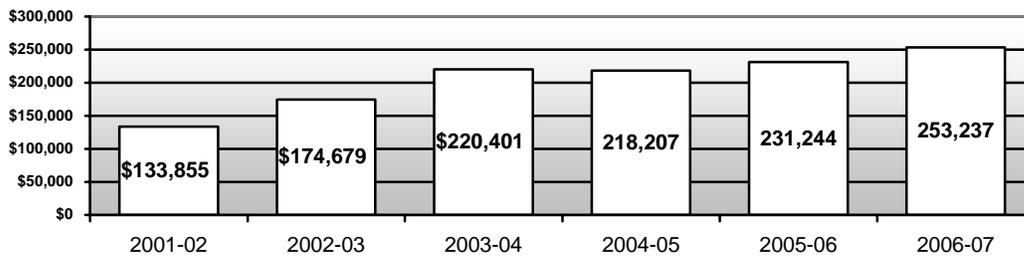
7.24 Museum Store Off-Site Sales



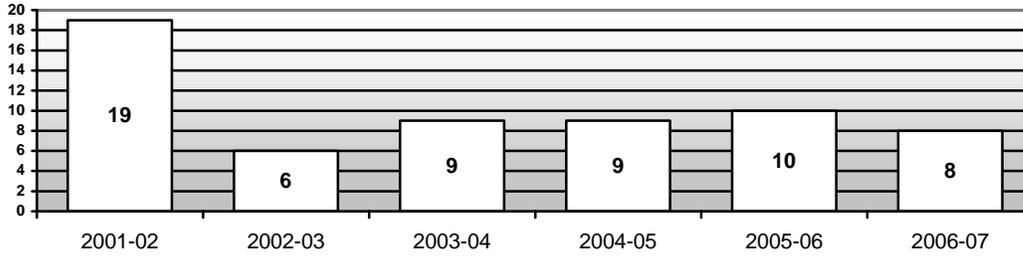
7.25 Museum Store Internet Sales



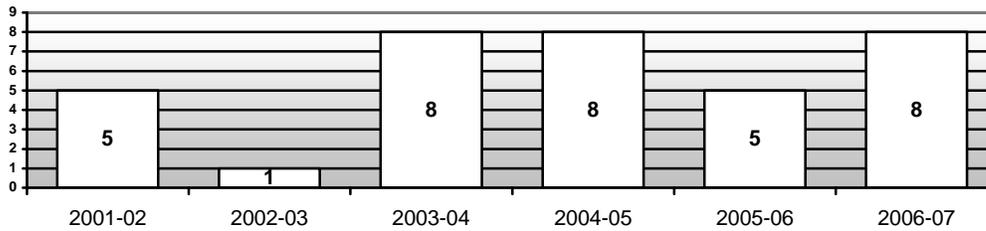
7.26 Gross Revenues from Facility Rental Program



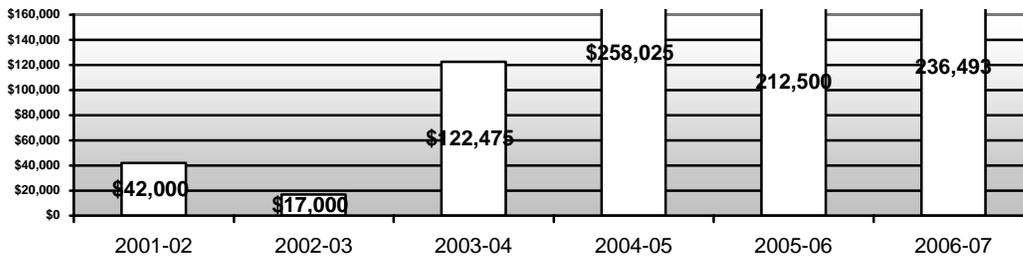
7.27 Number of Grant Proposals Submitted



7.28 Number of Grants Awarded

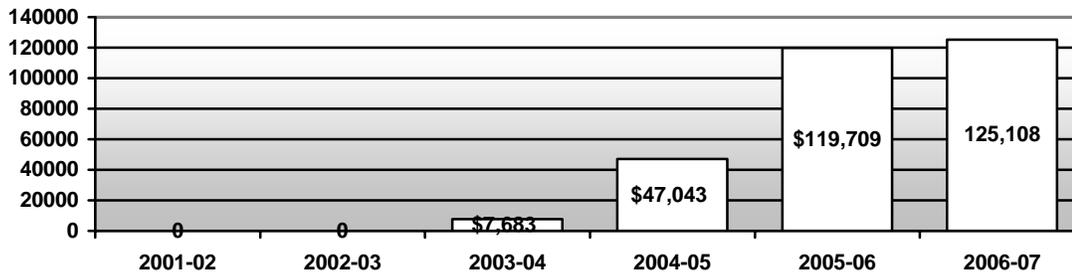


7.29 Total Grant Funds Awarded



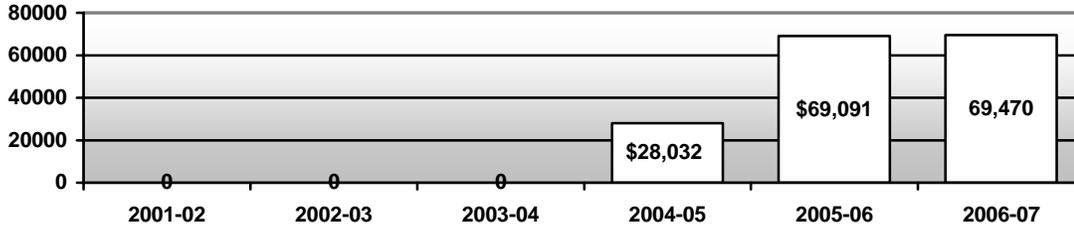
7.30 Food Service Revenue

7.30 Food Service Revenue



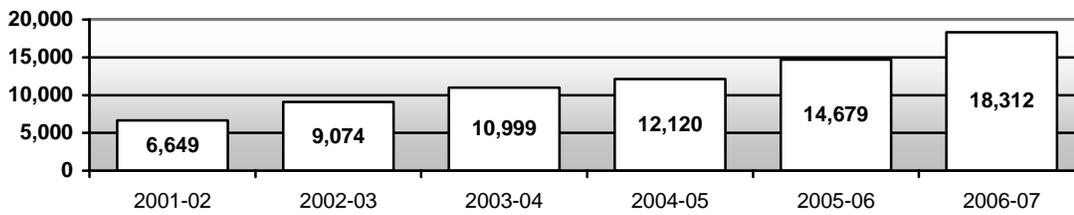
7.31 Café Revenue

7.31 Café Revenue



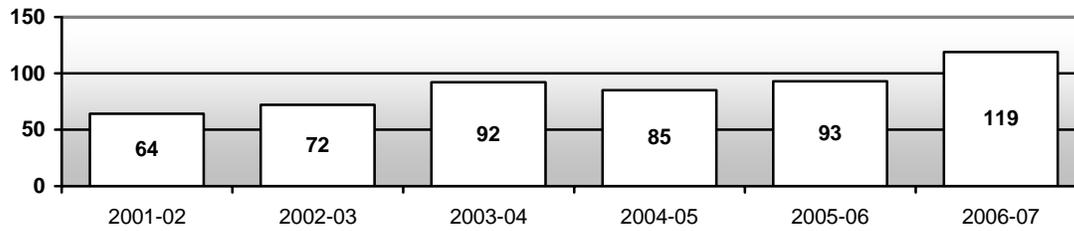
7.32 Program Revenue

7.32 Program Revenue



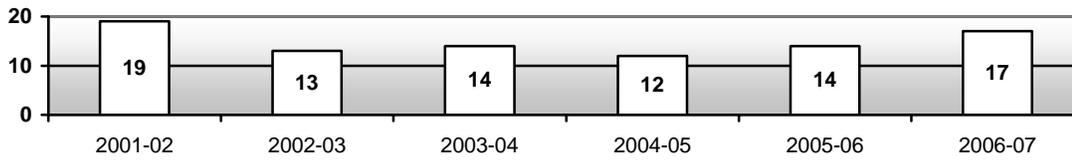
7.33 Program Measures

7.33 Number of Public Programs Presented

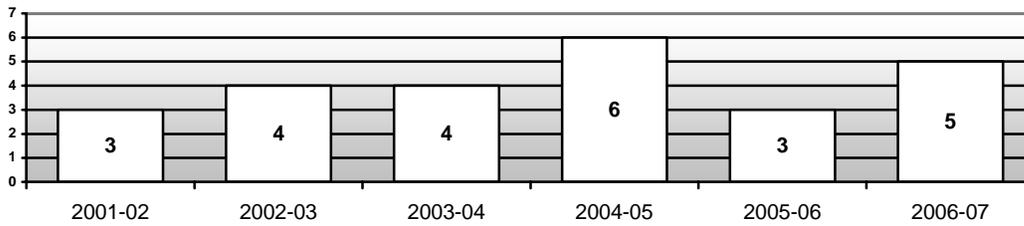


7.4 Exhibit Measures

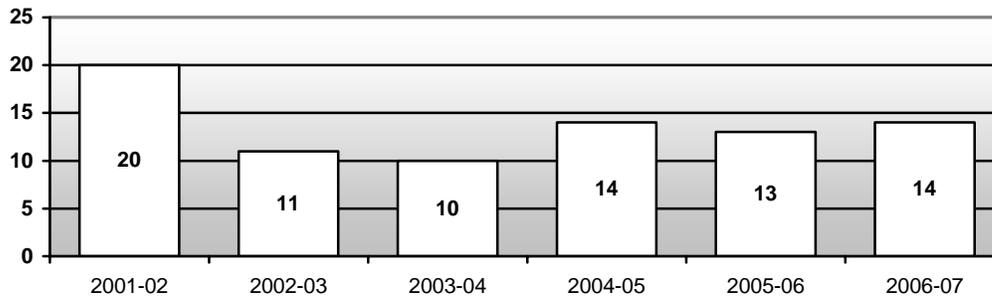
7.40 Number of Changing Exhibits Completed



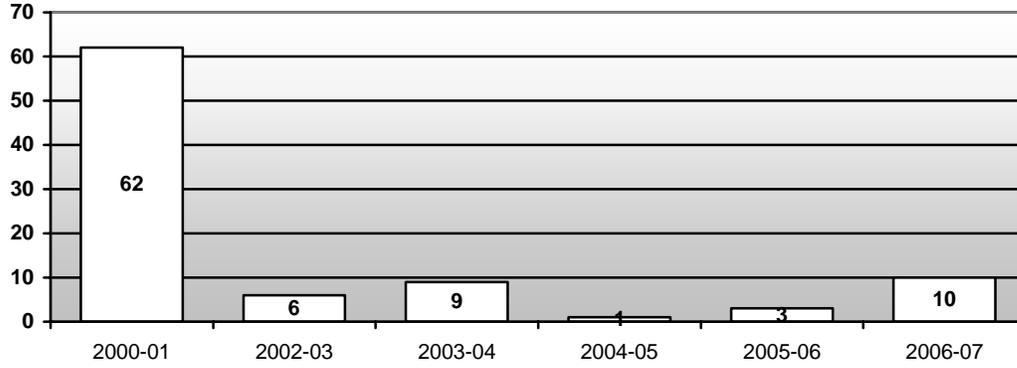
7.41 Traveling Exhibits Completed



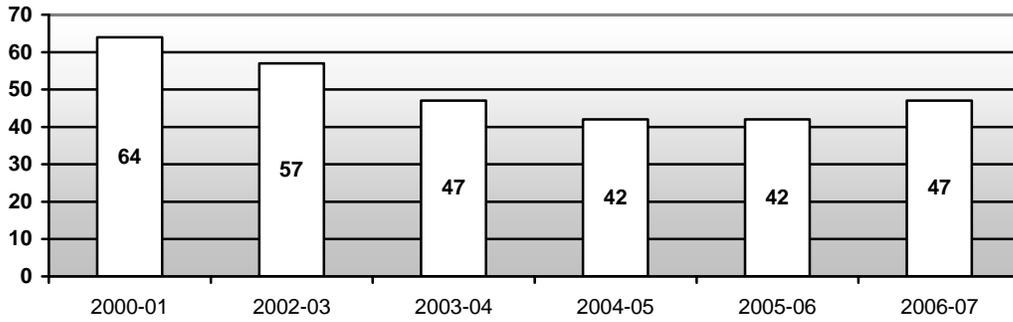
7.42 Number of Traveling Exhibits Available



7.43 Number of Consultancies Conducted by Museum Services

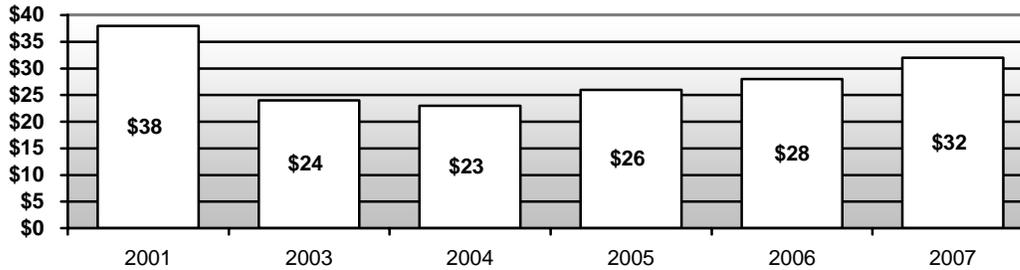


7.44 Number of Traveling Exhibits Bookings

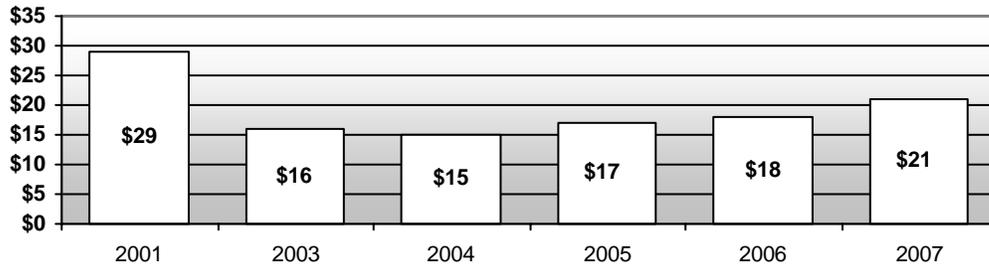


7.5 Expense Measures

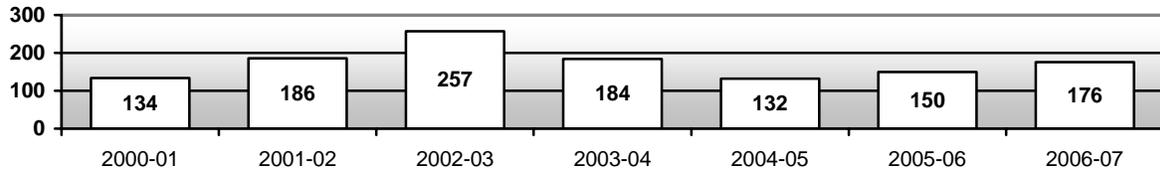
7.50 Productivity - Operating Costs per Visitor Bond not Included



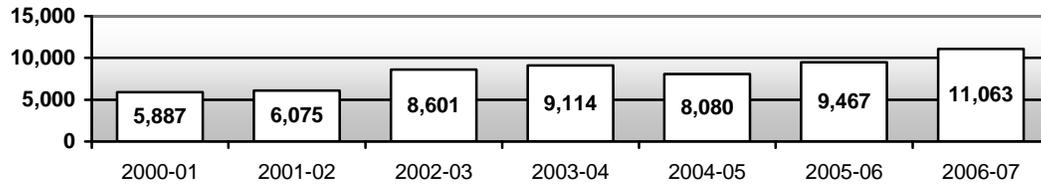
**7.51 Productivity - State Funds Per Visitor
Bond not Included**



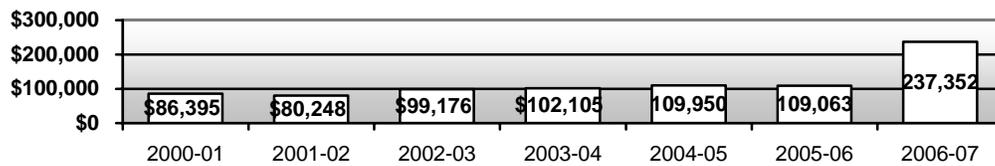
7.52 Number of Active Volunteers During the Year



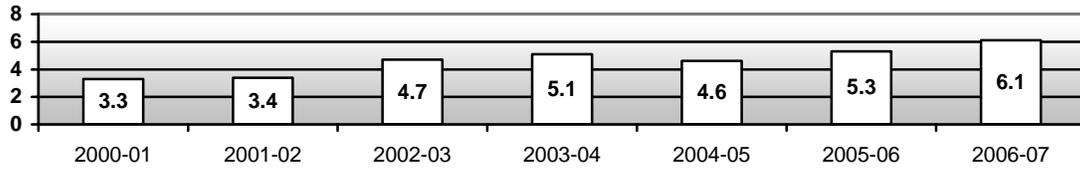
7.53 Number of Volunteer Hours Contributed



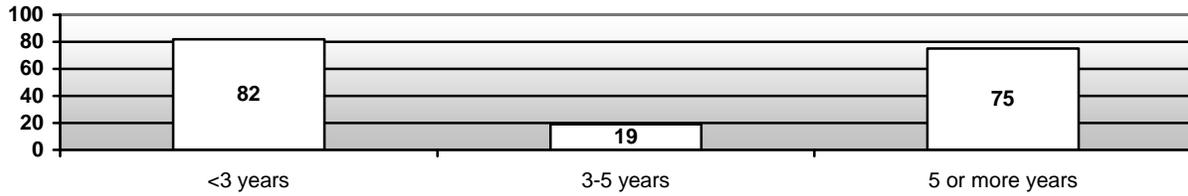
7.54 Value of Volunteer Hours



7.55 FTE Equivalency of Volunteer Hours

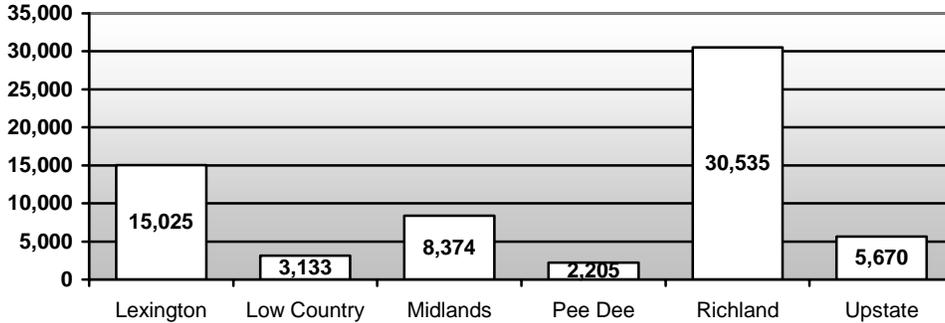


7.56 Number of Volunteers Serving

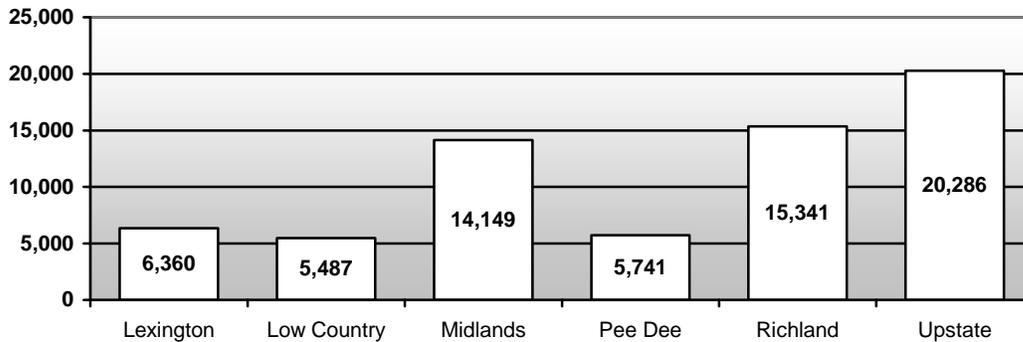


7.6 Statewide Visitation

7.60 FY 2006-07 SC Non-School Geographics by Region

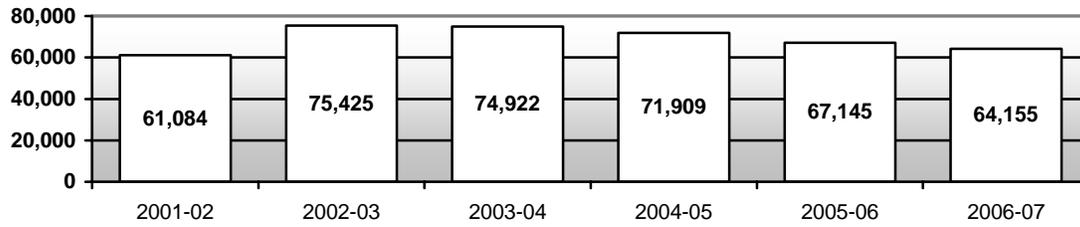


7.61 FY 2006-07 SC School Geographics by Region

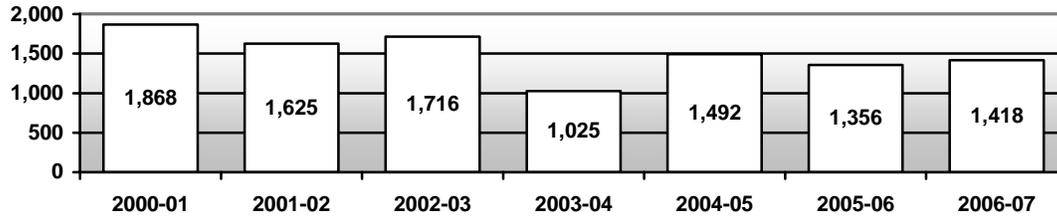


7.7 School Visitation Measures

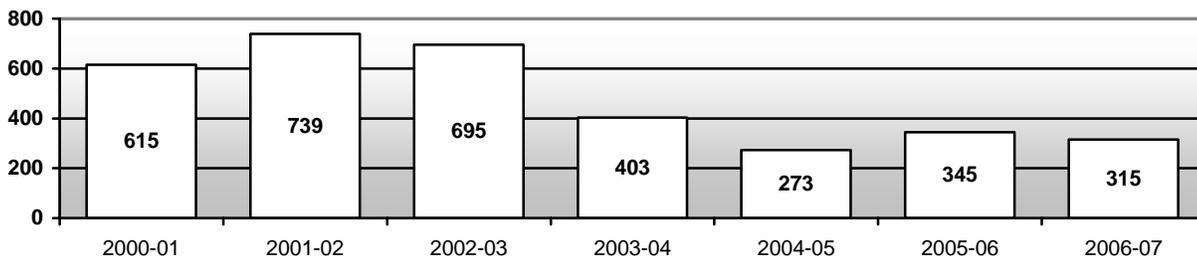
7.70 Number of Students, Teachers and Chaperons Participating Museum Programs



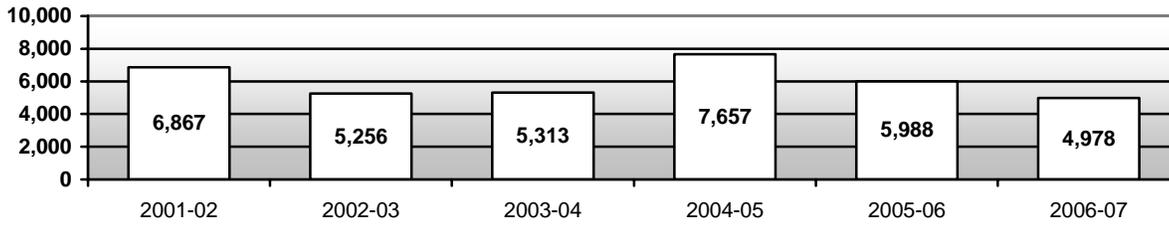
7.71 Number of Camp-In Participants



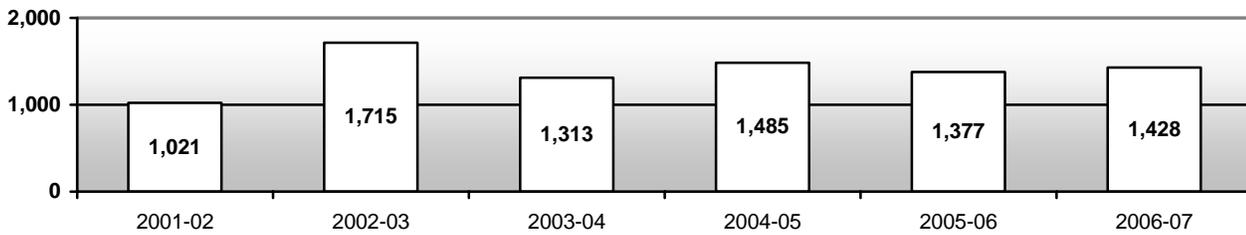
7.72 Number of Birthday Parties Participants



7.73 Number of Starlab Programs Participants

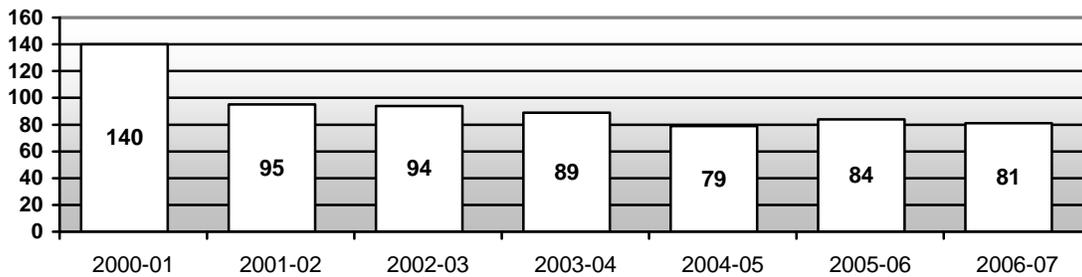


7.74 Number of School Reservations

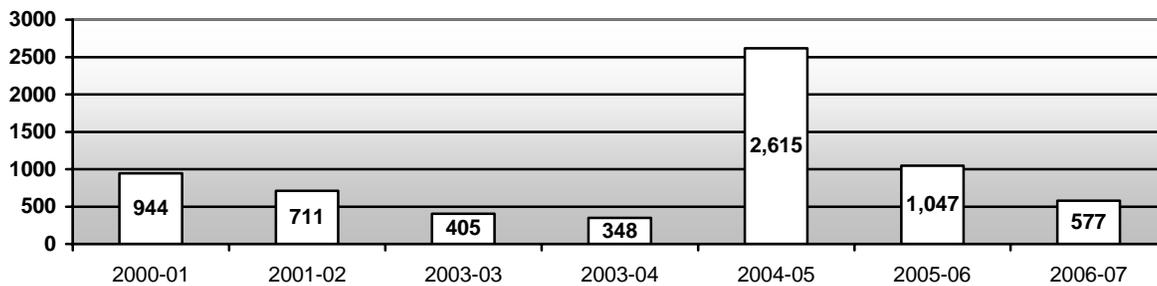


7.8 Collection Measures

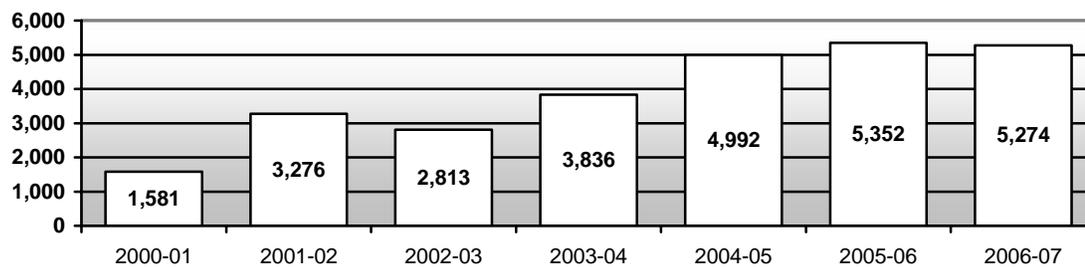
7.80 Number of Accessions Recorded



7.81 Number of Individual Objects added to Collections



7.82 Number of Public and Institutional Inquiries Answered by Curatorial Staff



7.83 Number of Peer Reviewed Publications

