

Oregon Historical Society Levy Oversight Committee

Memo

To: Multnomah County Board of Commissions
From: Avel Gordly and Nichole Maher, Co-Chairs of the Oregon Historical Society Levy Oversight Committee
CC: The Oregon Historical Society Levy Oversight Committee, Kerry Tymchuk
Date: 6/13/2012
Re: Annual Report to the Board of County Commissioners

As Co-Chairs of the Oregon Historical Society Levy Oversight Committee, we are delighted to report back to you on our first year's work.

Our committee's main charge has been to ensure that the Oregon Historical Society (OHS) is following through on promises made in the voter approved Measure 26-125: Five-Year Levy: Oregon Historical Society Library, Museum, educational programs.

Our additional responsibilities are laid out in the Financial Agreement between Multnomah County and the Oregon Historical Society. They are as follows:

- Meet at least semi-annually. ***(We have met enthusiastically six times since our creation.)***
- Provide minutes from our meetings on the Multnomah County website. ***(Meeting minutes and materials have been consistently posted following our meetings.)***
- Receive a report of levy expenditures from OHS and each of the four east Multnomah County historical societies receiving levy funds. ***(We have received these reports – see attached.)***
- Provide an annual briefing to the Board of County Commissioner regarding OHS compliance with the voter-approved measure.

The receipt of this report completes our fulfillment of these annual responsibilities.

Our committee has worked to clearly identify the promises made to voters in Measure 26-118. We have prepared the attached document to track our assessment of OHS compliance with such commitments in fiscal year 2012.

It is our pleasure to represent the good work of this committee, and we commend OHS for their participation and progress made in the last year. We're looking forward to our ongoing collaboration.

Oregon Historical Society (OHS) compliance with promises made in voter-approved Measure 26-118 as assessed by the Oregon Historical Society Levy Oversight Committee (LOC)

Ballot language from voter-approved Measure 26-118	LOC assessment of OHS compliance in FY 2012
<p>This Multnomah County local option levy will keep the Oregon History Museum open 40 hours a week</p>	<p>Museum Hours:</p> <ul style="list-style-type: none"> • Pre-levy hours, the Oregon Historical Society was open 40 hours per week: Tuesdays – Saturdays 10:00 am – 5:00 pm, Sundays 12:00 pm – 5:00 pm, closed Mondays. • Post-levy hours: Same hours as pre-levy during Winter and Spring. In Summer of 2012 will be open 47 hours per week, 7 days a week: Mondays – Saturdays 10:00 am – 5:00 pm, Sundays 12:00 pm – 5:00 pm
<p>and the Library open to the public 32+ hours a week</p>	<p>Library Hours:</p> <ul style="list-style-type: none"> • Pre-levy hours, open 12 hours per week: Thursday – Saturday 1:00 pm – 5:00 pm, closed Sundays - Wednesdays. • Post-levy hours, open 32 hours per week: Tuesdays 1:00 – 5:00 pm and Wednesdays - Saturdays 10:00 am – 5:00 pm, closed Mondays
<p>avoiding closure and restoring cuts to service.</p>	<p>The Oregon Historical Society is open and has restored some cuts.</p> <p>Restored Services:</p> <ul style="list-style-type: none"> • Oregon Historical Society has restored services to the library by hiring two (2) full-time Library Technicians. This not only increased the Library hours from 12 hours per week to 32 hours per week, but also has increased the level of service Library

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	<p>attendees receive due to the additional help at the reference desk.</p> <ul style="list-style-type: none"> • OHS is better able to work in collaboration with affiliates with the hiring of a full-time Registrar. Records and artifacts are kept in better condition; hence making it easier to locate the artifact(s) and information needed by sister historical organizations. • A part-time Assistant Editor was hired to free up the Editor's time to develop additional public programs with the Executive Director. • OHS has expanded public programs offered to its members and the general public. In the first 5 months of 2011, OHS offered 13 public events. In the same period for 2012, OHS offered 42 public events. One of the favorite monthly programs offered, due to the hiring of the Library Technicians, is the Genealogy Workshop. • OHS will also be able to increase the museum hours during the summer months from 40 hours per week (closed on Mondays) to 47 hours per week, open 7 days a week. • The levy funds have also made it possible for OHS to not make any further cuts to its services, and have given OHS the opportunity to look at ways to increase and improve its services to the public.
<p>It supports curation for the museum so that exhibits can be rotated and the collection and protection of Oregon's historical artifacts and documents can continue</p>	<p>Curation and Collection/Protection of Artifacts and Documents:</p> <ul style="list-style-type: none"> • Levy funds have allowed OHS to improve its collection and protection of Oregon's historical artifacts and documents with the hiring of a full-time Registrar. With this position in place, artifact record keeping and preservation process has been streamlined for efficiency and protection. • OHS is better able to work in collaboration with affiliates with the hiring of a full-time Registrar. More records and artifacts are able to be recorded and preserved; hence making it easier to locate the artifact(s) and information needed by sister historical

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	<p>organizations.</p> <ul style="list-style-type: none"> With the hiring of the two (2) Library Technicians, this has freed up our Interim Library Director to focus more on document accessions and de-accessions, film preservation, and online cataloguing of incoming collections.
<p>Levy funds will also protect the collection of Oregon history documents and artifacts, and public access to those, at four East Multnomah County Historical Societies which together will receive \$150,000 of the levy each of the five years.</p>	<p>The four east Multnomah County historical societies are planning for and taking steps to protect and grow their collections while also expanding access. See attached reports from the four east Multnomah County historical societies.</p>
<p>OHS levy funds shall be allocated in a manner that represents Multnomah County's diverse cultures.</p>	<p>The issue is of the utmost importance to the LOC, and is central to many discussions that have taken place over the last year. The committee is proud of the working relationship formed with OHS on this topic, and is committed to being partners in growing OHS's capacity in this way.</p> <p>Representation of Diverse Cultures: Diversity is a focus for OHS in every aspect of its operations; from Board selection, employee hiring process, to exhibit displays.</p> <ul style="list-style-type: none"> OHS' rotating exhibits have embraced all aspects of the Multnomah County population, and will continue to focus on diversity: <ul style="list-style-type: none"> September 15, 2011 – February 5, 2012: Salvation Army 100th Anniversary February 10 – 15, 2012: Freedom Fighters, an exhibit by the Roosevelt High School students February 18 – April 1, 2012: Bracero's Bittersweet Harvest Exhibit February 28 – June 12, 2012: Portland Community College

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	<p>50th Anniversary</p> <ul style="list-style-type: none"> o May 13 – July 31, 2012: IBEW o July – December 2012: Emanuel Hospital o January – March 2013: Oregon Black Pioneers o Summer 2013: Civil Rights o October – December 2013: Origami: Folding Paper
<p>The levy supports continuation of educational programs including free admission for every schoolchild to visit the museum and for all county residents - providing access to those previously unable to visit due to cost.</p>	<p>Free Admission: The Levy specified free admission to Multnomah County residents and to all Oregon school groups, effective July 1, 2011.</p> <p><u>Multnomah County Residents:</u></p> <ul style="list-style-type: none"> • From July 1, 2011 – December 31, 2011 admission numbers for Multnomah County Residents were 7,868. For the same time period in 2010, it was 4,689 for an increase of 68%. • From January 1, 2012 – April 30, 2012 admission numbers for Multnomah County Residents for the four months were 5,650. For the same time period in 2011, it was 4,637 for an increase of 22%.
<p>Free admission to Multnomah County residents</p>	<p><u>School and Other Group Tours:</u></p> <ul style="list-style-type: none"> • From July 1, 2011 – April 30, 2012 OHS had 6,105 K-12 school students with chaperones come from all corners of Oregon. They received not only free admission but also free bus shuttle service from OHS, thanks to a grant from the Weston Foundation. • For the same time period, college group tours numbered 500 students and adult/senior group tours numbered 437 people.

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<p><u>Library Admissions:</u></p> <ul style="list-style-type: none"> • From July 1, 2011 – December 31, 2011 admission numbers to the Library were 854. For the same time period in 2010, it was 587 for an increase of 45%. • From January 1, 2012 – April 30, 2012 admission numbers for the Library for the four months were 846. For the same time period in 2011, it was 447 for an increase of 89%. <p>Promotion of Free Admission to Multnomah County Residents: Advertising and promotion to Multnomah County residents were done through various mediums.</p> <ul style="list-style-type: none"> • Most recent advertising are the billboards in four (4) locations throughout Multnomah County. The billboard ads specifically promoting free admission for Multnomah County residents will be up for four (4) months, during which time the nine (9) billboard ads will be rotated to keep the freshness and interest level high. • OHS has put together a new Multnomah County membership brochure, which offers an additional \$10 discount to Multnomah County residents from normal membership prices. This will also be publicized on the OHS website under Membership. • Free Admission to Multnomah County residents is listed on the OHS website under Admissions. • The OHS quarterly newsletter has and will continue to publicize free Admission to Multnomah County residents. • Social media have and will be utilized to publicize the free admission on a periodic basis. 	
<p>The Multnomah County Chair will appoint an independent citizens oversight committee – representative of Multnomah</p>	<p>Resolution 2011-048 appointed the Levy Oversight Committee on April 28, 2011.</p>

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<p>County's diverse communities - to review all levy expenditures and ensure dollars are spent as promised.</p>	
<p>In addition, Multnomah County will select an auditor for which OHS will pay to conduct annual audits of levy funds that will be made available to the public.</p>	<p>OHS has an annual audit that clearly represents levy funds and is made public.</p>
<p>This levy will fund nearly one-half of operations at OHS facilities.</p>	<p>Levy Funds as Percentage of Operations:</p> <ul style="list-style-type: none"> • In OHS' calendar year 2011, the one levy payment received in July 2011 was 27% of unrestricted operations revenue. • In OHS' calendar year 2012, the two payments of levy funds are 43% of the unrestricted operations revenue budget.
<p>Other funds come from admissions, grants and private donations.</p>	<p>Fundraising Efforts: The Oregon Historical Society continues to look at every avenue for funds. From July 1, 2011 to now, the following fundraising programs have raised approximately \$2.1M:</p> <ul style="list-style-type: none"> • Spring and Fall annual funds appeal and follow up. • Annual History Makers Dinner. • Exhibit campaigns for Oregon Voices, Oregon Rocks! and the Modern Exhibit Series. • Planned Giving program. • Grant requests to private and public organizations such as: Multnomah County Cultural Coalition, Reser's Fine Foods, Wells Fargo, Oregon Cultural Trust, Regional Arts & Culture Council, Ritz Family Foundation, National Endowment for the Humanities, Rose E. Tucker Charitable Trust, The Ford Family Foundation, Oregon Parks and Recreation Department, Samuel S. Johnson

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<p>Foundation to name a few.</p>	<p>While OHS has received one-time support from the state of Oregon, sustainable funding has not been restored.</p> <ul style="list-style-type: none"> • OHS received \$2.5M from the State of Oregon for this biennium to pay off the mortgage on the Gresham warehouse. This frees up approximately \$200,000 per year from mortgage payments, which will be added to operations to continue to provide quality programs and services to the public. • Request from the State was not to come back in this biennium. However, we are working on continuing our relationship with the legislators and keeping them informed of how OHS preserves and protects Oregon's history.
<p>To consistently provide the services promised to the voters, the Multnomah County Board of Commissioners will consider termination or reduction of the levy if the State of Oregon restores funding to OHS.</p>	