

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 <u>2015</u>	LOC assessment of OHS compliance in FY <u>2016</u>
This Multnomah County local option levy will keep the Oregon History Museum open 40 hours a week	Museum Hours: <ul style="list-style-type: none"> The hours have remained the same since the summer of 2011: open 47 hours per week, 7 days a week: Mondays – Saturdays 10:00 am – 5:00 pm, Sundays 12:00 pm – 5:00 pm 	Museum Hours: <ul style="list-style-type: none"> No change since 2015
and the Library open to the public 32+ hours a week	Library Hours: <ul style="list-style-type: none"> The Library continues to be open 32 hours per week: Tuesdays 1:00-5:00 pm and Wednesday-Saturday 10:00-5:00. In addition to the 2014 library programs of workshops on genealogy and house history throughout the year, the library is now presenting small series of library collection exhibits, not only in the library but throughout OHS. 	Library Hours: <ul style="list-style-type: none"> No change from 2015 The Library has continued the programs mentioned in 2015, but also added public traveling programs for the lantern slide show throughout Portland and rest of Oregon.
Avoiding closure and restoring cuts to service.	Restored Services Update: In 2015, several promotions and new hires continue to restore cuts to services and improve our outreach: <ul style="list-style-type: none"> The Library Technical Services Manager was promoted to Library 	Restored Services Update: To continue to restore services, the following are new positions hired and promotions in 2016:

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)

	<p>Deputy Director in response to the needs of staff and continued excellent service to our patrons.</p> <ul style="list-style-type: none"> • Another Reference Specialist has been hired to assist patrons of the library for reference materials, information, and guidance. • Oral History project cataloger has been hired to clean up, organize and catalog our sound recording collections. • The levy funds have also made it possible for OHS to not make any further cuts to its services, and has given OHS the opportunity to look at ways to increase and improve its services to the public. 	<ul style="list-style-type: none"> • 2 Digital Project Archivist to assist in ramping up the digital vault for access to our collections. • 2 Museum Catalogers to work on backlog of 3-D artifacts. • Oral History Project Archivist was promoted to Oral History Librarian responsible for taping oral histories of prominent history making Oregonians as well as being responsible for the Oral History department. • Archives Specialist was promoted to Archivist to work on manuscripts and mixed archival collections as well as library accessions. • The levy funds continue to make it possible to increase and improve OHS' 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 promote our Registrar to Collections Manager in charge of preservation and access of our 3-D artifacts and the work of the staff in preserving and protecting our collections. • To assist the Collections Manager, a Curator of Collections has been hired to prepare artifacts for proper storage. 	<p>Curation and Collection/Protection of Artifacts and Documents:</p> <ul style="list-style-type: none"> • To assist the Museum Collections Manager and Curator of Museum Collections, 2 Museum Catalogers were hired to assist with the preparation of artifacts for proper storage and to record the artifacts into the museum software. • Collections, including those processed into record, continue to be rotated at OHS and loaned out to other historical societies.

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	<ul style="list-style-type: none">• The two new collections positions will greatly improve the desperately needed clean up, organization and cataloging of our museum exhibit collections which is also loaned out to other museums.• To continue to showcase relevant rotating exhibits, a Curator of Exhibits and Special Projects was hired for accuracy of content and exhibit display work.• Since everything in this world is digital, except a lot of historical collections, a Digital Archivist has been hired to lay the ground work on how our collections, once digitized, should be cataloged and stored in a “digital vault” that can be accessible to staff, other organizations and the world at large. This is a must if historical societies are to be relevant to the computer generations. This project will take a minimum of two years to lay the foundation of the vault before any digitization or storage can happen.• Through grants, an Archives Specialist was hired to process and catalog the Oregon Journal photographs.• The Library Deputy Director is working with the Chinese-American	<ul style="list-style-type: none">• The digital vault project was to take two years to lay the foundation of the vault before any digitization or storage could happen. This foundation project has been completed ahead of time and digitization of collections is happening with the hiring of the 2 Digital Project Archivists.• HVAC system at the Gresham warehouse was upgraded for better control of temperature and humidity that is so important in collection preservation and protection.
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	community to preserve their documents.	
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>The four east Multnomah County historical societies have received their portions of the levy funds. Please see their individual reports on how they're utilizing the levy funds to protect and make their documents and artifacts accessible to their constituents.</p> <p>OHS continues to assist not only the four East Multnomah County Historical Societies, but to all museums across Oregon, known as OHS affiliates, with OHS staff knowledge and expertise, partnerships in programs, and collection loans.</p>	Same as 2015, with the addition of a grant writing program provided to all affiliates, since historical societies depend heavily on grants. Plus \$155,000 was distributed to the East County Historical Societies.
OHS levy funds shall be allocated in a manner that represents Multnomah County's diverse cultures.	<p>Representation of Diverse Cultures: This issue is of the utmost importance, not only to the LOC, but to OHS. Diversity continues to be a focus for OHS in every aspect of its operations; from Board selection, employee hiring process, to exhibit displays and programs.</p> <ul style="list-style-type: none"> OHS is proud of its efforts to diversify the Board. Depending on whether you take the percentage of white only from the Census of 	<p>Representation of Diverse Cultures Update: Diversity in the Board, staff, exhibit displays, and programs continues to be top priority.</p> <ul style="list-style-type: none"> OHS continues to focus on diversity in its Board. OHS exceeds the white only percentage from the Census of 87.9% or white only, non-Hispanic percentage of 77%, with 21% of its Board members as ethnic minorities.

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	<p>87.9% or white only, non-Hispanic percentage of 77%, OHS exceeds the diversity percentage of Oregon with 24% of its Board members as ethnic minorities.</p> <ul style="list-style-type: none"> • We have also improved the aim of geographic diversity of the Board, with representatives from the Coast, Eastern Oregon, Southern Oregon, and Central Oregon. • We continue to improve the gender diversification of the Board, which currently is 25% female. • Every effort is made to diversify the ethnicity and gender of OHS staff. The Executive Team is 67% female, with 11% minority ethnicity. OHS staff is also representative of Oregon's population with 15% of its staff of minority ethnicity and 60% females. • OHS' rotating exhibits, along with its programs and events, have embraced all aspects of the Multnomah County population, and will continue to focus on diversity: <ul style="list-style-type: none"> ○ Wine Industry was represented in the <i>Clink! A Taste of Oregon Wine</i> exhibit from June 7 – September 20, 2014 ○ Men, women and machines that shaped our region's 	<ul style="list-style-type: none"> • OHS continues to have representation from all corners of Oregon with Board members from the Coast, Eastern Oregon, Southern Oregon, and Central Oregon. • Gender diversity continues to improve with 26% female Board members. • Every effort is made to diversify the ethnicity and gender of OHS staff with job postings accessible worldwide. The Executive Team is 80% female, with 10% minority ethnicity. OHS staff is also representative of Oregon's population with 15% of its staff of minority ethnicity and 69% females. • OHS' rotating exhibits, along with its programs and events, continue to embrace all aspects of the Multnomah County population, and will continue to focus on diversity. Exhibits: <ul style="list-style-type: none"> ○ The Chinese American community was highlighted with the exhibits <i>Chinese Americans: Exclusion/Inclusion</i> and <i>Beyond the Gate: A Tale of Portland's Historic Chinatown</i> from January 28 – June 21. ○ The Black community exhibit of Document of a Dynamic Community: The Scanner Photography of Julie Keefe's documentary of the black community's growth and
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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)

	<p>geography and trade routes were featured in the exhibit <i>Working on the River: A History of Dredging</i> from May 1 – October 30, 2014</p> <ul style="list-style-type: none"> ○ Utility industry was represented with an exhibit from PGE of <i>Powering Oregon: 125 Years of PGE</i> from December 15, 2014 – May 1, 2015. ○ Photographers were showcased in <i>Place: Framing the Oregon Landscape</i> exhibit from November 8, 2014 – May 17, 2015. ○ The third exhibit series at OHS produced by the Oregon Black Pioneers was on display from February 1 – October 4, 2015. OHS works in partnership with the Oregon Black Pioneers for exhibits and programs. ○ OHS' programs and events have covered the multi-ethnic diversity of Oregon with programs such as <i>OHS Welcomes The Skanner Archive, Civil Rights Act of 1964, Oregon's Racial and Gendered Exclusions</i> 	<p>evolution was a hit with all visitors.</p> <ul style="list-style-type: none"> ○ Permanent exhibit <i>History Hub</i> highlighting the diverse population of Oregon opened on November 1. This exhibit is now part of the school curriculum. ○ Rotating exhibits of mile marker celebrations of our local community organizations was displayed: <i>Police Officer in Portland: 1851 – Present, George Fox University's 125th anniversary, and Multnomah Athletic Club's 125th anniversary.</i> ○ For the baseball enthusiasts in our community, the first ever display of the <i>Baseball's Magna Carta: Setting the Rules of America's Game</i> was at the Oregon Historical Society from July 1 – October 9. ○ Oregon, especially in Portland, has a lot of comic artists who were highlighted in the display <i>Comic City USA</i> from August 12 – January 31, 2017. ○ <i>Democracy's Blueprints: The Document That Built America</i> showcased rare documents such as the U.S. Constitution.
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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)

	<p><i>Compared to Contemporary Standards</i> are just a few examples.</p> <ul style="list-style-type: none"> ○ OHS' <i>Teddy Roosevelt Show</i> was taken around Oregon cities of Salem, Jefferson, Bend, Prineville, Rainier, Hood River, Madras, Beaverton, Tualatin and Lincoln City as a fundraiser or special program for the historical Societies. This was their program supplied by OHS for which the Societies did all the planning and organizing for their community, with a little support from OHS. ○ OHS' famous lecture series, the Hatfield Historians Forum, was presented at Bend and Ashland in partnership with the historical societies as their fundraiser or special event. Again, they did all the organizing and promoting, with little support from OHS. ○ OHS is currently working with the Chinese-American community for a Chinese-American exhibit to be on 	<p>Programs and Events:</p> <ul style="list-style-type: none"> ○ Screening of <i>Latino Americans: 500 Years of History</i>. ○ <i>The Jewish Frontier</i> screening in partnership with OPB. ○ Dragon Dance and Parade from Chinatown to OHS ○ Panel discussion with elders of Portland's Chinese American community. ○ <i>Chinese Couplets</i> documentary. ○ <i>Immigrant Voices from Portland's Historic Chinatown</i> panel discussion. ○ <i>Angel Island Immigration Station and Chinese Exclusion</i> screening. ○ <i>The Making of Asian America</i> lecture. ○ <i>Chinese Genealogy</i> seminar. ○ Panel discussion around <i>Grand Immigration: Three Perspectives on Past Policies and Practices</i>. ○ Screening of <i>Reel vs. Real: Muslim Media Stereotypes and Islamophobia</i>. ○ "Yellow Peril" and the American Republic: <i>Spinning Loss and Fear in Campaign Election Cycles</i> lecture. ○ Film premiere of <i>Darcelle XV</i> in partnership with OPB.
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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)

	<p>display from January – June, 2016.</p> <ul style="list-style-type: none"> ○ <i>The Skanner</i> awarded OHS the first Diversity Heritage Award for outreach work to the African American community in Portland. 	<ul style="list-style-type: none"> ○ Chinese opera performance by the Yat Sing Music Club. ○ <i>The Jewish Oregon Story</i> book launch. ○ <i>Neither Harmony Nor Eden: Margaret Peppers and the Exile of the Japanese Americans</i> lecture in partnership with Oregon Cultural Heritage Commission and Holy Names Heritage Center. ○ <i>Harmony & Hysteria: Azalea Peet, Margaret Peppers, and the Japanese American Camps of WWII</i> lecture in partnership with Oregon Cultural Heritage Commission and Holy Names Heritage Center. ○ Screening of <i>Honor and Duty: The Mississippi Delta Chinese</i> in partnership with the Chinese American Citizens Alliance. ○ <i>The Story of the Triple Nickle: Black Paratroopers in Washington State</i> lecture. ○ <i>Pearl Harbor Remembrance: Conflict Transformations Across 75 Years</i> panel discussion featuring WWII veterans, military professionals, historians, and more.
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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)

<p>The levy supports continuation of educational programs including free admission for every school child to visit the museum and for all county residents - providing access to those previously unable to visit due to cost.</p>	<p>Free Admission for School Groups: The Levy specified free admission to all Oregon school groups, effective July 1, 2011.</p> <p><u>School and Other Group Tours:</u></p> <ul style="list-style-type: none"> • 2015 had 10,488 students from K-12 with chaperones visiting OHS. There is no change in percentage increase or decrease from the previous year. • College/Adult Group attendance fluctuates, depending on the subjects covered in college. No effort is put into promoting to the adult groups, hence the swings in numbers from one year to the next. In 2015, college group tours numbered 468 students and adult/senior group tours numbered 152 people. 	<p>Free Admission for School Groups: Levy requires free admission to all Oregon school groups:</p> <p><u>School and Other Group Tours:</u></p> <ul style="list-style-type: none"> • 2016 had 7,184 students from K-12 with chaperones visiting OHS for a decrease of 31% from the previous year. • College/Adult Group attendance fluctuates, depending on the subjects covered in college. No effort is put into promoting to the adult groups, hence the swings in numbers from one year to the next. 2016, college group tours numbered 1,294 students and adult/senior group tours numbered 99 people.
<p>Free admission to Multnomah County residents</p>	<p>Free Admission to Multnomah County Residents:</p> <p>The levy specified free admission to Multnomah County residents.</p> <p><u>Multnomah County Residents:</u></p> <ul style="list-style-type: none"> • 2015 admission numbers for Multnomah County Residents was 27,067 for an increase of 17% from the previous year. 	<p>Free Admission to Multnomah County Residents:</p> <p>The levy specified free admission to Multnomah County residents.</p> <p><u>Multnomah County Residents:</u></p> <ul style="list-style-type: none"> • 2016 admission numbers for Multnomah County Residents was 24,894 for a decrease of 8% from the previous year.

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)

	<ul style="list-style-type: none"> 2010 total was 10,606; 2011 was 14,471; 2012 was 19,136, 2013 was 21,334 and 2014 was 23,109. <p><u>Library Admissions:</u></p> <ul style="list-style-type: none"> 2015 admission numbers to the Library was 1,736 which is a 40% decrease from the previous year. Library admissions in 2010 was 1,391; 2011 was 1,516; 2012 was 2,067; 2013 was 2,086 and 2014 was 1,826. 	<ul style="list-style-type: none"> 2010 total was 10,606; 2011 was 14,471; 2012 was 19,136, 2013 was 21,334 and 2014 was 23,109, 2015 was 27,067. <p><u>Library Admissions:</u></p> <ul style="list-style-type: none"> 2016 admission numbers to the Library was 1,642 which is a 5% decrease from the previous year. Library admissions in 2010 was 1,391; 2011 was 1,516; 2012 was 2,067; 2013 was 2,086, 2014 was 1,826 and 2015 was 1,736.
The Multnomah County Chair will appoint an independent citizens oversight committee – representative of Multnomah County’s diverse communities - to review all levy expenditures and ensure dollars are spent as promised.	The Levy Oversight Committee has met regularly.	<p>The Levy Oversight Committee (LOC) has met regularly in the first half of 2016.</p> <p>Changes in staff and LOC members occurring in the second half of the year made it difficult to meet.</p>
In addition, Multnomah County will select an auditor for which OHS will pay to conduct annual audits of levy funds that	OHS has an annual audit that clearly represents levy funds and is made public. OHS’ 2015 audited financials are available on line at www.ohs.org .	OHS has an annual audit that clearly represents levy funds and is made public. OHS’ 2016 audited financials are available on line.

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)

will be made available to the public.		
This levy will fund nearly one-half of operations at OHS facilities.	Levy Funds as Percentage of Operations: <ul style="list-style-type: none"> In OHS' calendar year 2015, the levy funded 33% of operations 	Levy Funds as Percentage of Operations: <ul style="list-style-type: none"> In OHS' calendar year 2016, the levy funded 40% of operations
Other funds come from admissions, grants and private donations.	Fundraising Efforts: The Oregon Historical Society continues to look at every avenue for funds. We continue to fundraise through the annual funds appeal, annual History Makers Dinner, exhibit campaigns and planned giving programs that have been mentioned in the report for the last three years. We have also received grants from: <ul style="list-style-type: none"> Collins Foundation of \$200,000 to implement the digital vault. National Film Preservation Foundation of \$14,600 for preservation of motion pictures. Murdock Foundation of \$210,000 plus \$150,000 from the Institute of Library and Museum Services (ILMS) for a new, permanent exhibit called History Hub aimed at all age of patrons displaying both low and high tech interactives showcasing content and displays 	Fundraising Efforts: Fundraising through the annual funds appeal, annual History Makers Dinner, exhibit campaigns and planned giving programs is consistently being done on an annual basis. In 2016, OHS started an unofficial capital campaign dubbed the silent phase to test whether a capital campaign is feasible at this time. Official kickoff was January 2017 for funds for Library renovation, Oregon My Oregon refresh, and the digital vault. During the silent phase \$2M was secured towards the capital campaign goal of \$12M. We have also received grants from: <ul style="list-style-type: none"> Faye & Lucille Stewart Foundation of \$150,000 towards the library renovation. Marie Lamfrom Charitable Foundation of \$7,500 for National History Day.

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)

	<p>of Oregon's various ethnic groups. OHS is currently working in partnership with the Oregon Black Pioneers and Southern Oregon Historical Society. But partnerships will change as the display changes to focus on other diverse populations.</p> <ul style="list-style-type: none"> ○ Oregon Department of Education of \$44,000 for <i>Oregon Studies</i>. ○ Spirit Mountain of \$5,000 for a digital history project. 	<ul style="list-style-type: none"> ○ Jackson Foundation of \$47,000 for digitization of the Oregon Journal Newspaper. ○ Institute of Museum and Library Services of \$66,097 for History Hub. ○ Miller Foundation of \$30,000 for History Hub. ○ Juliet Ashby Hillman Foundation of \$5,000 for improvement of the traveling trunks to schools for education. ○ Keller Foundation of \$25,000 for digital vault. ○ Murdock Charitable Trust of \$40,000 for History Hub. ○ Collins Foundation of \$25,000 for the digital vault. ○ Wells Fargo of \$10,000 for the Teddy Roosevelt Road Show to schools and historical societies all around Oregon. ○ Oregon State Library of \$11,597 for digitization of Finley and Bohlman photos. ○ Ann & Bill Swindells Charitable Trust of \$50,000 for public engagement.
<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</p>	<p>While OHS has received support from the State of Oregon, sustainable funding has not been restored.</p> <ul style="list-style-type: none"> • OHS received \$410,713 from the State of Oregon for the 2015. 	<p>Sustainable funding has not been restored. OHS received support from the State of Oregon:</p> <ul style="list-style-type: none"> • OHS received \$546,428 from the State of Oregon for the 2015.

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State of Oregon restores funding to OHS.		
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