



Oklahoma Historical Society

FY 2023 Budget Hearing Presentation

Submitted by: Trait Thompson, Executive Director

Trait Thompson Executive Director



- The Oklahoma Historical Society's statutory duties are as follows:
 - 1. Collect, purchase, catalog, store, preserve, conserve and maintain books, maps, photographs, newspapers, records, reports, manuscripts, charts, paintings, three-dimensional artifacts and other materials germane to the history of Oklahoma, the Indian and the West;
 - 2. Gather and utilize collected materials to create interpretive exhibits illustrative of the history of Oklahoma, the United States and the world in the Oklahoma Museum of History and at other assigned museums and historic sites;
 - 3. Prepare and publish materials relative to the history of the State of Oklahoma.
 - 4. Prepare and publish matters relating to the Society's transactions and research as may be useful to its membership and the public:
 - 5. Develop an oral history program for the State of Oklahoma designed to promote the preservation and utilization of oral history within the state concerning significant elements of the social, political, economic, cultural, educational, ethnic and military history of the geographical area now known as the State of Oklahoma; transcribe, index, catalog and maintain the results of these interviews to make them readily available to the public and historical researchers;
 - 6. Develop an educational program for the purpose of making available to schools and the public information pertaining to the history of Oklahoma through the utilization of collections and properties held by the Society.

Founded in 1893, this agency now encompasses the following divisions: **Administration, Museums and Sites, Preservation, and Research.**

Agency Vision, Mission and Core Values

Vision:

The vision of the Oklahoma Historical Society is to set the highest standards of the historical community in efficient, creative and responsible ways.

Mission:

The mission of the Oklahoma Historical Society is to collect, preserve, and share the history and culture of the state of Oklahoma and its people.

Core Values:

The OHS places public service, today, tomorrow, and far into the future, as a guiding principle.

The key to success depends on an entrepreneurial business plan that includes high standards, efficient management, and the ability to attract partners.

All programs of the OHS will adhere to the highest standards of integrity, discipline, and transparency.

Effective planning, considering statutory authority, sustainability, and vertical communication from board members and managers to team members and constituents, is central to success if the OHS is to leverage resources to collect, preserve, and share Oklahoma history.



Accomplishments & Challenges

Top accomplishments for FY 2021

- 1) The Oklahoma Heritage Preservation Grant program awarded approximately \$450,000 in grant funds to museum non-profit organizations across the state for special projects.
- 2) Developed and designed a comprehensive exhibit and interpretive plans for the new State Capitol Museum, featuring 13 artifact exhibit cases, 120 artifacts, 8 interactive touch screens, 23 graphic panels, and an immersive introductory film shown by 6 projectors on a 270-degree surface.
- 3) Digitized 85,000 pages of the Oklahoma Eagle newspaper from Tulsa, which chronicles some of the only first-hand accounts of Black Tulsans impacted by the 1921 Tulsa Race Massacre.
- 4) Completed renovation of the 1840s hospital at the Fort Gibson historic site, installed interpretive exhibits, and moved visitor center operations into the building.
- 5) Re-launched the Oklahoma history podcast, A Very OK Podcast. Hosted by Trait Thompson and Dr. Bob Blackburn, the podcast has been listened to over 5,000 times since being re-launched in March 2021.

Challenges (current & upcoming years)

- 1) Attendance at OHS museums and sites continues to rebound from the COVID-19 pandemic but has not reached 2019 levels yet. Decreased attendance will continue to negatively impact our earned revenue, which allows us to pay staff, initiate new programming, and hold events.
- 2) Deferred maintenance is a continued drag on vital resources, both in personnel and funding. With an annual maintenance budget of \$700,000 and deferred maintenance needs in excess of \$40 million, we are constantly in a reactive, instead of proactive, state.
- 3) Staff cuts over the past several years have hampered our ability to provide the quality experience our patrons deserve. Many of our museums and sites subsist on a skeletal staff, and in some cases, must close unexpectedly if staff members are ill or on vacation.
- 4) The national labor shortage has made it difficult to fill key positions such as maintenance technicians, historical interpreters, carpenters, etc. Furthermore, we must be cognizant of wage discrepancies as our salaries are not competitive with similar opportunities in the private sector for both full-time and part-time positions.



Goals & Projects for FY 2023

Goals

- 1) Begin the process of addressing millions of dollars in deferred maintenance needs for 26 OHS sites after successful passage of a bond issue through the legislature.
- 2) Develop a comprehensive 5-year staffing plan which identifies critical needs, succession planning, talent gaps in the agency.
- 3) Develop a career development plan which outlines priorities, opportunities, implementation, and fiscal impact.
- 4) Develop a formal customer feedback system to capture feedback and gauge satisfaction for visits to OHS events and sites.
- 5) Implement a formal fundraising plan with various initiatives throughout the year.
- 6) Completion of a mobile-friendly website.
- 7) Increase paid visitation at each site by 10% as compared to FY21 figures.

Projects

- 1) Kick off annual giving campaign with a goal to raise \$125,000 for OHS programming, education, special exhibits, and events.
- 2) Initiate a collections assessment project to get a comprehensive understanding of the items in the OHS collection state-side and identify gaps to aid in acquiring items in the future.
- 3) Continue work to digitize the Chronicles of Oklahoma scholarly journal and add issues to the Gateway to Oklahoma History website.
- 4) Complete the sale of the Will Rogers Birthplace Ranch near Oologah to the Cherokee Nation.
- 5) Upgrade the OHS website to be compatible with mobile devices.
- 6) Initiate a \$7-\$10 million fundraising campaign for OKPOP in Tulsa to provide for necessary staff and operating expenses during the first 2 years of service.
- 7) Seek grant funding for repair and replacement of historical markers throughout the state.
- 8) Complete development, design, and installation of a new exhibit in the Oklahoma History Center on Oklahoma aviation entitled, "Taking Flight: Oklahomans Explore the Skies."
- 9) Develop a comprehensive and cohesive marketing and promotion plan to highlight all OHS museums and sites statewide and increase attendance numbers.
- 10) Renovate and update the 7,000 square foot American Indian gallery at the Oklahoma History Center.
- 11) Initiate planning for the 200th anniversary of historic Fort Gibson and Fort Towson in 2024.

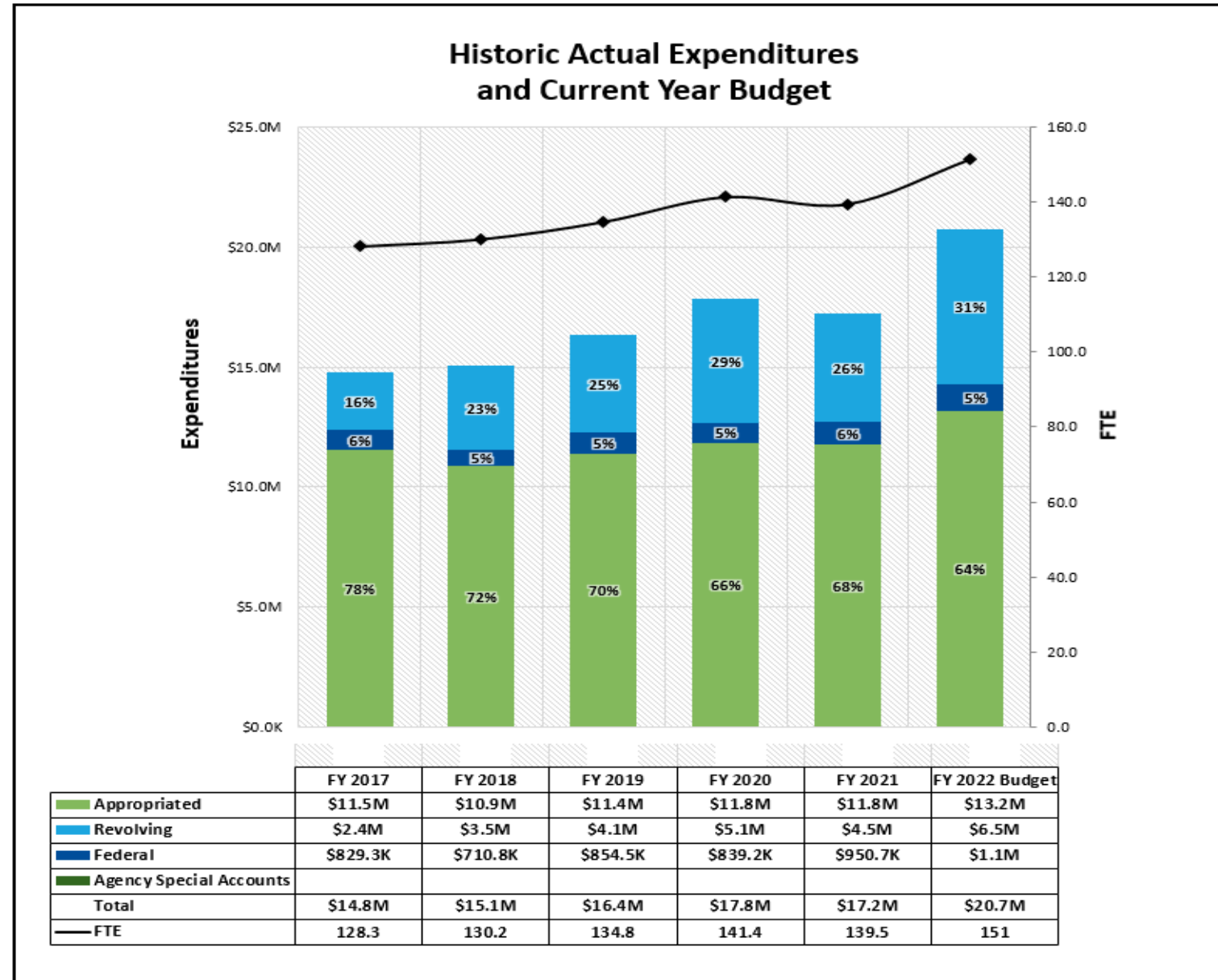


Savings & Efficiencies

- Reduction in IT data storage costs saved approximately \$86,000.
- OKPOP has gone from 7 FTEs and 5 part-time employees in FY21 to 5 FTEs and 3 part time employees in FY22.
- The Special Projects and Development Division has been merged with the Publications Division to consolidate common functions and enable better collaboration.
- Contracted with 14 local non-profit organizations to support operations, administer admissions, and handle gift shop sales at field museums and historic sites.
- Launched a digital oral history project at Fort Gibson in partnership with Oklahoma Humanities using grant funding.
- Partnered with Tulsa broadcaster John Erling's Voices of Oklahoma oral history project to bring his collection into the OHS archives and develop new content in the future.



Historic Actual Expenditures (FY 17-21) and Current Year Budget (FY 22)



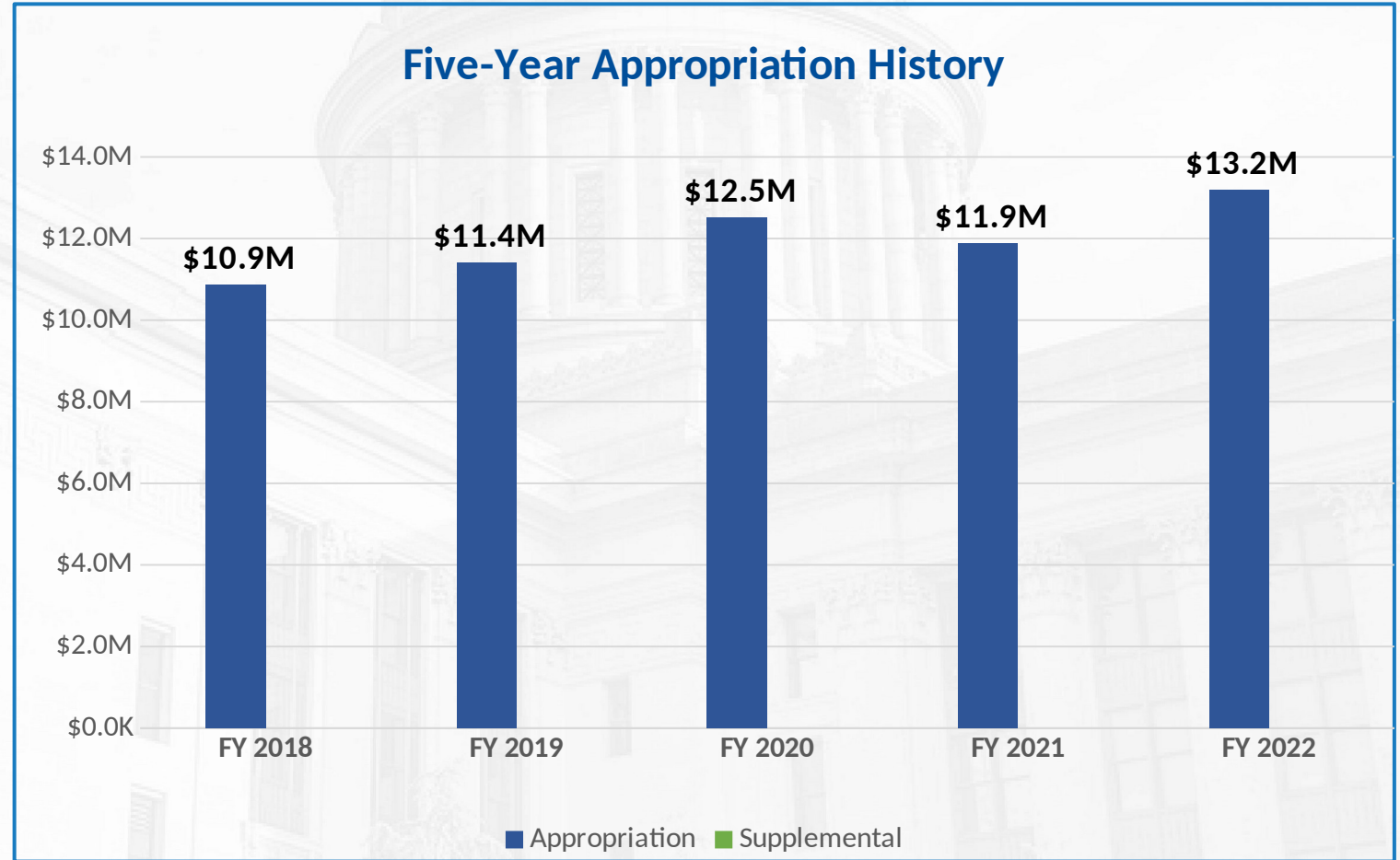


FY 2022 Budgeted Full Time Equivalents (FTE)

	FY 2022 Budgeted FTE
Total FTE	151
Supervisor FTE	22
Supervisors to Total FTE Ratio (%)	1:7 (14.6%)

Appropriation History

Fiscal Year	Appropriation (\$) <i>(include supplemental if applicable)</i>
FY 2018	\$10,857,102
FY 2019	\$11,407,032
FY 2020	\$12,504,540
FY 2021	\$11,871,018
FY 2022	\$13,192,324



Appropriated Carryover History and Justification

		FY 2017 (Actuals)	FY 2018 (Actuals)	FY 2019 (Actuals)	FY 2020 (Actuals)	FY 2021 (Actuals)	FY 2022 (Planned)
Total appropriated carryover amount expended (\$)		0	0	0	0	0	0
Fiscal Year of the original appropriation	Projected amount carried over to FY 2023 (\$)	Describe how projected carryover will be used in FY 2023					
FY 2022	0						
FY 2021	0						
Total projected FY 23 Carryover (\$)	0						



Available Cash Description and Justification

Class Fund #	Available Cash amount (\$)
N/A	0.00
Total Available Cash:	0.00

Available cash is unbudgeted cash that is not restricted by federal partners, statute, or contractual obligations.

Fiscal Year	Agency's plan to deploy available cash (include amounts):
FY 2023	
FY 2024	
FY 2025	



Agency Key Performance Metrics

Metric		Goal	FY 20 Actuals	FY 21 Actuals	FY 22 Target	FY 23 Target
1	Provide service to patrons by sharing information, expertise, and educational information. Measure is number of visitors.	Museums & Sites, Goal #2 - Sharing	282,609	130,130	245,200	377,500
2	The OHS will describe and catalog at least 3,000 museum artifacts each year. Measure is number of artifacts cataloged.	Museums & Sites, Goal #1 - Collect & Preserve	3,505	11,941	11,500	11,100
3	The OHS and Friend's groups will raise, through grants and donations, at least \$1,000,000 each fiscal year. Measure is dollar amount of funds collected.	Museums & Sites, Goal #3 - Developing	\$1,539,836	\$1,602,725	\$6,410,700	\$8,237,363
4	The OHS will review at least 2,800 federal projects for Section 106 compliance each fiscal year. Measure is number of federal projects reviewed.	Preservation, Goal #2 - Managing	5,219	3,082	3,100	3,100
5	The OHS will digitize at least 200,00 newspaper pages each fiscal year. Measure is number of pages digitized.	Research, Goal #1 - Collect & Preserve	250,000	304,750	300,505	325,805



Budget & Supplemental Request Summary

Request Name		FY 23 Appropriated Request Amount (\$)	Type of Request: Operating, One-time, or Supplemental
1	Bond issue or special cash for deferred maintenance	\$46,000,000	One-Time
2	Debt service payments for \$45M deferred maintenance bond issue	\$2,800,000	Operating
3	Personnel Funds	\$1,250,120	Operating
4	Ft. Gibson and Ft. Towson 200 th Anniversary	\$380,000	One-Time
5	Connect remote field sites and museums to OKC	\$60,000	Operating
6	Operating funds for Ft. Supply historic site	\$66,000	FY 22 Supplemental FY 23 Operating



(1) Budget Request

Bond issue or special cash for deferred maintenance

Type: (Operating, One-Time, Supplemental)
One-Time

\$46,000,000

The OHS intends to take care of deferred maintenance at the History Center, field sites, and museums before the costs to do so increase substantially more due to continued deterioration, possibly causing the total loss of historic structures.

** Duplicate these slides as needed to describe all requests.*



(2) Budget Request

Debt service payments for \$45M deferred maintenance bond issue

Type: (Operating, One-Time, Supplemental)
Operating

\$2,800,000

Provide OHS with sufficient funds to manage debt service payments for new bond issue.

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(3) Budget Request

Personnel Funds	
Type: (Operating, One-Time, Supplemental) Operating	\$ 1,250,120
Restore personnel positions cut due to budget cuts and to add new positions necessary for the OHS to fulfill its mission.	

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(4) Budget Request

Ft. Gibson and Ft. Towson 200th Anniversary

Type: (Operating, One-Time, Supplemental)
One-Time

\$380,000

Funds to plan, coordinate and execute events and activities celebrating the 200th anniversary celebration of the Ft. Gibson and Ft. Towson historic military sites.

** Duplicate these slides as needed to describe all requests.*



(5) Budget Request

Connect remote field sites and museums to the OKC data servers

Type: (Operating, One-Time, Supplemental)
Operating

\$60,000

Connect remote field sites and museums to OKC data servers for data security, backup, and for software updates to be applied to the field computers remotely.

** Duplicate these slides as needed to describe all requests.*



(6) Budget Request

Connect remote field sites and museums to the OKC data servers

Type: (Operating, One-Time, Supplemental)
FY 22 Supplemental, FY 23 Operating

\$66,000

Operating funds for the historic Ft. Supply site that the Corrections Department will no longer be providing support for.

** Duplicate these slides as needed to describe all requests.*

