

**FY23 Budget Performance Review
35000 Oklahoma Historical Society**

Lead Administrator: Trait Thompson

Lead Financial Officer: Terry Howard

Agency Mission

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

Division and Program Descriptions

Note: Please define any acronyms used in program descriptions.

01 Administration

Administration - Encompasses the following divisions: Finance, Purchasing, Public Information, IT, Development, Human Resources and Mail/Supply

10 Museums & Sites

Museums & Sites - Encompasses the following major areas: Sites, Museums, Historic Homes, the History Center and Will Rogers Memorial Museum.

20 Preservation

Preservation - Operation of the State Historic Preservation Office.

40 Research

Research - Operation of the Research Division at the History Center.

88 IT

IT - All agency IT purchases/leases and services provided by OMES.

FY'22 Budgeted Department Funding By Source

Dept. #	Department Name	Appropriations	Federal	Revolving	Local ¹	Other ²	Total
01	Administration	\$936,119		\$146,459			\$1,082,578
10	Museums & Sites	\$9,783,007		\$5,619,318			\$15,402,325
20	Preservation	\$323,257	\$1,048,164	\$0			\$1,371,421
40	Research	\$1,410,903		\$600,326			\$2,011,229
88	IT	\$739,037	\$20,044	\$43,372			\$802,453
Total		\$13,192,324	\$1,068,208	\$6,409,475	\$0	\$0	\$20,670,007

1. Please describe source of Local funding not included in other categories:
2. Please describe source(s) and % of total of "Other" funding if applicable for each department:

FY'21 Carryover by Funding Source

Class Fund #	Carryover Class Fund Name	Appropriations	Federal	Revolving	Local ¹	Other ²	Total
		\$0	\$0	\$0	\$0	\$0	\$0

1. Please describe source of Local funding not included in other categories:
2. Please describe source(s) and % of total of "Other" funding if applicable:

What changes did the agency make between FY'21 and FY'22?

1.) Are there any services no longer provided because of budget cuts?

Yes, services have been lost in all divisions due to the 48% budget cuts over the past ten years. In addition to reduced hours of operation in the library and at museums and historic sites scattered across the state, the elimination of staff positions across the board has been a setback in terms of critical planning, staff development, and projects that generate revenue and press coverage.

2.) What services are provided at a higher cost to the user?

There have not been any increases in fee.

3.) What services are still provided but with a slower response rate?

Research assistance by mail and email; digitization and posting on our website of archival records and historic newspapers; planning and fabrication of new museum exhibits

4.) Did the agency provide any pay raises that were not legislatively/statutorily required?

The only pay raises granted were due to promotions, career progressions, and market adjustments as authorized by statute.

FY'23 Requested Funding By Department and Source

Dept. #	Department Name	Appropriations	Federal	Revolving	Other ¹	Total	% Change
01	Administration	\$1,037,119	\$0	\$146,459	\$0	\$1,183,578	9.33%
10	Museums & Sites	\$13,609,727	\$0	\$5,619,318	\$0	\$19,229,045	24.85%
20	Preservation	\$323,257	\$1,048,164	\$0	\$0	\$1,371,421	0.00%
40	Research	\$1,979,303	\$0	\$600,326	\$0	\$2,579,629	28.26%
88	IT	\$799,037	\$20,044	\$43,372	\$0	\$862,453	7.48%
Total		\$17,748,444	\$1,068,208	\$6,409,475	\$0	\$25,226,127	22.04%

1. Please describe source(s) and % of total of "Other" funding for each department:

FY'23 Top Five Operational Appropriation Funding Requests

Request by Priority	Request Description	Appropriation Request Amount (\$)
Request 1:	\$46M bond issue/special cash for deferred maintenance	\$46,000,000
Request 2:	Debt service payments for bond issue	\$2,800,000
Request 3:	Restore personnel funds lost due to budget cuts	\$1,250,120
Request 4:	Ft. Gibson and Ft. Towson 200th anniversary activities	\$380,000
Request 5:	Connect remote sites and museums to OKC data center	\$60,000
Request 6:	Operating funds for Ft. Supply	\$66,000
Top six Request Subtotal:		\$50,556,120
Total Increase above FY-22 Budget (including all requests)		\$ 50,556,120
Difference between Top Five requests and total requests:		\$0

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Does the agency have any costs associated with the Pathfinder retirement system and federal employees?

The agency will have an approximate expense of \$18,200 for FY23.

How would the agency be affected by receiving the same appropriation for FY '23 as was received in FY '22? (Flat/ 0% change)

Service will be provided at approximately same level. Inability to replace staff reduced by budget cuts in the last few years.

How would the agency handle a 2% appropriation reduction in FY '23?

We would have to close or transfer 3 historic sites or museums affecting approximately 5 FTEs.

Is the agency seeking any fee increases for FY '23?

	Fee Increase Request (\$)	Statutory change required? (Yes/No)
Increase 1 None		

What are the agency's top 2-3 capital or technology (one-time) requests, if applicable?

Description of request in order of priority	Appropriated Amount (\$)	Submitted to LRCPC? (Yes/No)
Priority 1		

Federal Funds

CFDA	Federal Program Name	Agency Dept. #	FY 22 budgeted	FY 21	FY 20	FY 19	FY 18
15.904	Historic Preservation Grant In Aid	20	1,068,208	799,744	742,686	863,344	781,834

Federal Government Impact

1.) How much federal money received by the agency is tied to a mandate by the Federal Government?	100%
2.) Are any of those funds inadequate to pay for the federal mandate?	No
3.) What would the consequences be of ending all of the federal funded programs for your agency?	The result would be the elimination for the Office of Historic Preservation, which is the contractual partner of the National Park Service to evaluate the impact of federal undertakings on historical resources. The environmental clearance for some oil and gas well sites, highway projects, housing projects, national bank construction, tax credits, and federal grants would fall to the Historic Advisory Council in Washington, D.C. and result in lengthy delays in utilizing federal funds or requiring federal permits.
4.) How will your agency be affected by federal budget cuts in the coming fiscal year?	Federal budget cuts could reduce preservation grants to local cities, reduce the number of historic surveys that speed the review process, and reduce the staff, which would slow all services delivered by the SHPO staff.
5.) Has the agency requested any additional federal earmarks or increases?	The OHS has not requested any additional federal earmarks or increases.

FY'22 Budgeted FTE

Division #	Division Name	Supervisors	Classified	Unclassified	\$0 - \$35 K	\$35 K - \$70 K	\$70 K - \$\$\$
1	Administration	4	8	3	3	5	3
10	Museums & Sites	9	65	11	19	54	3
20	Preservation	1	8	1	3	5	1
40	Research	4	18	3	12	7	2
Total		18	99	18	37	71	9

FTE History

Division #	Division Name	2022 Budgeted	2021	2020	2018	2013
1	Administration	12.0	12.0	12.0	11.0	13.0
10	Museums & Sites	81.0	79.0	79.0	80.0	84.0
20	Preservation	10.0	10.0	9.0	10.0	10.0
40	Research	21.0	21.0	21.0	23.0	27.0
Total		124.0	122.0	121.0	124.0	134.0

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Performance Measure Review					
	FY 21	FY 20	FY 19	FY 18	FY 17
Program Name					
Administration					
Institutional partnerships	221	176	178	132	130
Professional development of staff (hours)	751	805	865	812	852
Website visits	9,118,632	7,181,941	6,957,258	6,516,168	6,419,948
Museums & Sites					
Artifacts received	4,557	1,508	1,698	1,190	1,177
Museum visitors	130,130	282,609	336,872	375,628	401,100
History Day student and teacher participants	6,597	7,530	7,196	6,365	6,578
Major exhibits opened	12	12	13	12	12
Community events hosted at OHS facilities	533	3,610	1,686	440	435
Volunteer hours	32,158	42,581	45,112	44,518	40,437
State funds spent on repair and maintenance	1,023,529	1,663,084	1,094,342	1,086,302	1,196,519
Preservation					
Additions to Oklahoma Landmarks Inventory	2,500	4,996	2,595	4,512	4,462
Resources nominated to the National Register	70	413	213	48	46
Local preservation programs	13	32	47	13	13
Federal projects reviewed for section 106	3,082	5,219	5,084	3,301	3,259
Consultations made	3,752	4,158	3,716	6,213	5,998
Research					
Photographs received	232,256	258,621	193,584	215,982	35,000
Newspaper titles received	263	263	265	260	223
Research patrons	50,136	42,580	45,117	46,081	42,095
Publications released	90	90	90	90	90
Pages of collections digitized and placed online	1,500,000	235,102	365,891	258,974	294,705
Research requests processed	20,992	11,305	11,700	7,145	7,871

Revolving Funds (200 Series Funds)			
Please provide fund number, fund name, description, and revenue source	FY'19-21 Avg. Revenues	FY'19-21 Avg. Expenditures	June '21 Balance
Fund number: Fund name			
20000 - OHS Main Revolving Fund	\$3,142,521	\$2,992,979	\$153,405
29000 - Will Rogers Museum Revolving	\$143,878	\$181,242	\$15,564
22500 - Sales/Use Tax Revolving	\$1,535,549	\$1,774,501	\$1,105,971
24100- Tulsa Race Massacre	\$1,500,000	\$16,082	\$1,466,983