

## FY 2024 Budget Performance Review

### 350 Oklahoma Historical Society

Lead Administrator: Trait Thompson, Executive Director

Lead Financial Officer: Gabby Hosek, CFO

#### 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 its people.

#### Division and Program Descriptions

*Note: Please define any acronyms used in program descriptions.*

##### Division or Program Number and Name

*Administration - Encompasses the following divisions: Finance, Purchasing, Human Resources, Strategic Initiatives, White Hair Memorial, and Mail/Supply*

*Preservation - Operation of the State Historic Preservation Office.*

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

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

*Communications & Development - Encompasses Public Information, Multicultural Office, Development, and Membership*

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

#### FY'23 Budgeted Department Funding By Source

Dept. #	Department Name	Appropriations	Federal	Revolving	Local <sup>1</sup>	Other <sup>2</sup>	Total
10	Administration	\$5,139,983		\$1,619,375		\$278,378	\$7,037,736
20	Preservation	\$342,273	\$1,315,816				\$1,658,089
30	Museums & Sites	\$5,617,535		\$3,653,077			\$9,270,612
40	Research	\$1,604,071		\$212,833			\$1,816,904
50	Communications & Development	\$534,408		\$686,945			\$1,221,353
88	IT	\$728,395	\$18,544	\$106,829		\$50,602	\$904,370
<b>Total</b>		<b>\$13,966,665</b>	<b>\$1,334,360</b>	<b>\$6,279,059</b>	<b>\$0</b>	<b>\$328,980</b>	<b>\$21,909,064</b>

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: **Private**

#### FY'22 Carryover by Funding Source

Class Fund #	Carryover Class Fund Name	Appropriations	Federal	Revolving	Local <sup>1</sup>	Other <sup>2</sup>	Total
							\$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: **Private**

#### What changes did the agency make between FY'22 and FY'23?

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

Yes, services have been lost in all divisions due to 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?**

Slight increase in OHC admission fees and small proposed increases in Research fees. These are comparable to other museums in the OKC area and other research institutes.

**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, which is why the agency is requesting additional recurring funds for personnel raises.

FY'24 Requested Funding By Department and Source								
Dept. #	Department Name	Appropriations	Federal	Revolving	Other <sup>1</sup>	Total	% Change	
10	Administration	\$5,633,442	\$0	\$1,619,375	\$278,378	\$7,531,195		7.01%
20	Preservation	\$385,578	\$1,315,816	\$0	\$0	\$1,701,394		2.61%
30	Museums & Sites	\$7,214,424	\$0	\$3,653,077	\$0	\$10,867,501		17.23%
40	Research	\$1,903,682	\$0	\$212,833	\$0	\$2,116,515		16.49%
50	Communications & Development	\$595,144	\$0	\$686,945	\$0	\$1,282,089		4.97%
88	IT	\$788,395	\$18,544	\$106,829	\$50,602	\$964,370		6.63%
<b>Total</b>		<b>\$16,520,665</b>	<b>\$1,334,360</b>	<b>\$6,279,059</b>	<b>\$328,980</b>	<b>\$24,463,064</b>		<b>11.66%</b>

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

FY'24 Top Five Operational Appropriation Funding Requests		
Request by Priority	Request Description	Appropriation Request Amount (\$)
Request 1:	Personnel raises	\$1,250,000
Request 2:	General increase in costs	\$1,100,000
Request 3:	Increased funding for affiliate site contracts	\$204,000
<b>Top Five Request Subtotal:</b>		<b>\$2,554,000</b>
<b>Total Increase above FY-23 Budget (including all requests)</b>		<b>\$ 2,554,000</b>
Difference between Top Five requests and total requests:		\$0

**Does the agency have any costs associated with the Pathfinder retirement system and federal employees?**  
 The agency will have an approximate expense of \$30,872 for FY23

**How would the agency be affected by receiving the same appropriation for FY '24 as was received in FY '23? (Flat/ 0% change)**  
 Service will be provided at approximately the same level or may see a potential decrease if we cannot give staff raises.

**How would the agency handle a 2% appropriation reduction in FY '24?**  
 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 '24?		
	Fee Increase Request (\$)	Statutory change required? (Yes/No)
Increase 1	Research fee adjustments	No
Increase 2	OHC admission fee adjustments	No
Increase 3		

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							
Priority 2							
Priority 3							
Federal Funds							
CFDA	Federal Program Name	Agency Dept. #	FY 23 budgeted	FY 22	FY 21	FY 20	FY 19
15.904	Historic Preservation Grant In Aid	20		\$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'23 Budgeted FTE							
Division #	Division Name	Supervisors	Non-Supervisors	\$0 - \$35 K	\$35 K - \$70 K	\$70 K - \$100K	\$100K+
10	Administration	6	9	2	8	3	2
20	Preservation	5	5		9		1
30	Museums & Sites	36	52	26	56	3	3
40	Research	4	16	2	16	2	
50	Communications & Development	3	8	1	8	1	1
<b>Total</b>		<b>54</b>	<b>90</b>	<b>31</b>	<b>97</b>	<b>9</b>	<b>7</b>

FTE History						
Division #	Division Name	2023 Budgeted	2022	2021	2019	2014
1	Administration (changed to 10 in FY23 - no longer using this division)	N/A	12.0	12.0	12.0	13.0
10	Administration (changed from 01 in FY23 - was Museums & Sites)	15.0	N/A	N/A	N/A	N/A
20	Preservation	10.0	10.0	10.0	9.0	10.0
30	Museums & Sites (changed from 10 in FY23 - was not used previously)	88.0	81.0	79.0	79.0	84.0
40	Research	20.0	21.0	21.0	23.0	27.0
50	Communications & Development (separated from admin in FY23)	11.0	N/A	N/A	N/A	N/A
<b>Total</b>		<b>144.0</b>	<b>124.0</b>	<b>122.0</b>	<b>123.0</b>	<b>134.0</b>

Performance Measure Review					
Program Name	FY 22	FY 21	FY 20	FY 19	FY 18
<b>Administration</b>					
Institutional partnership	199	221	176	178	132
Professional development of staff (house)	2,064	751	805	865	812
<b>Preservation</b>					
Additions to Oklahoma Landmarks Inventory	1,832	2,500	4,996	2,595	4,512
Resources nominated to the National Register	24	70	413	213	48
Local preservation programs	27	13	32	47	13
Federal projects reviewed for section 106	3,796	3,082	5,219	5,084	3,301
Consultations made	3,955	3,752	4,158	3,716	6,213
<b>Museums &amp; Sites</b>					
Artifacts received	2,184	4,557	1,508	1,698	1,190
Museum visitors	157,948	130,130	282,609	336,872	375,628
History Day student and teacher participants	6,880	6,597	7,530	7,196	6,365
Major exhibits opened	3	12	12	13	12
Community events hosted at OHS facilities	1,109	533	3,610	1,686	440
Volunteer hours	33,036	32,158	42,581	45,112	44,518
State funds spent on repair and maintenance	1,643,307	1,023,529	1,663,084	1,094,342	1,086,302
<b>Research</b>					
Photographs received	111,580	232,256	258,621	193,584	215,982
Newspaper titles received	107	263	263	265	260
Research patrons	46,358	50,136	42,580	45,117	46,081
Publications released	N/A	90	90	90	90
Pages of collections digitized and placed online	1,900,190	1,500,000	235,102	365,891	258,974
Research requests processed	14,176	20,992	11,305	11,700	7,145
<b>Communications &amp; Development</b>					
Website visits	7,069,603	7,181,941	6,957,258	6,516,168	6,516,168
Social media views	6,216,986	4,973,589	N/A	N/A	N/A

Revolving Funds (200 Series Funds)			
Please provide fund number, fund name, description, and revenue source	FY'20-22 Avg. Revenues	FY'20-22 Avg. Expenditures	June '22 Balance
<b>Fund number: Fund name</b>			
20000 - OHS Main Revolving Fund	\$2,241,779	\$2,054,930	\$94,848
29000 - Will Rogers Museum Revolving	\$184,236	\$152,645	\$41,549
22500 - Sales/Use Tax Revolving	\$1,708,504	\$1,876,237	\$816,560
24100- Tulsa Race Massacre	\$1,500,000	\$16,082	\$1,466,983

**FY 2023 Current Employee Telework Summary**

List each agency location, then report the number of employees associated with that location in the teleworking categories indicated. Use "No specified location" to account for remote employees not associated with a site. Use actual current employees, not budgeted or actual FTE.

**Full-time and Part-time Employees (#)**

Agency Location / Address	City	County	Onsite (5 days onsite, rarely remote)	Hybrid (2-4 days onsite weekly)	Remote (1 day or less weekly onsite)	Total Employees
800 Nazih Zuhdi Drive	OKC	Oklahoma	84	3	1	88
All field sites (various)	Various	Various	56			56
<b>Total Agency Employees</b>						<b>144</b>