

CLACKAMAS COUNTY BOARD OF COUNTY COMMISSIONERS

Policy Session Worksheet

Presentation Date: 5/21/19 **Approx. Start Time:** 1:30 PM **Approx. Length:** 30 min.

Presentation Title: Clackamas County Heritage Project Update

Department: Business and Community Services

Presenters: Jennifer Burns, BCS Heritage Project Manager
Laura Zentner, BCS Director
Greg Williams, BCS Deputy Director

Other Invitees:

WHAT ACTION ARE YOU REQUESTING FROM THE BOARD?

N/A - Staff will provide an update on the Heritage Project.

EXECUTIVE SUMMARY:

Clackamas County Heritage Organizations

The heritage organizations in Clackamas County include over 40 historic sites and museums open to the public, interpretive organizations and historical societies, historic review boards, and genealogical libraries. Their areas of focus include such wide-ranging topics as the importance of the Willamette Falls to the Native populations, Oregon's territorial history, and the state-of-the-art technology involved in motorsports, to name a few.

Heritage organizations provide important services to County residents. They serve as keepers of the community's collective memory and care for Clackamas County's most important historical treasures. The heritage organizations not only tell the story of the development of Clackamas County, but at many sites, the interpretive themes have statewide and national importance. As such, these organizations offer a unique asset to the residents of the County as well as provide a draw for tourists from outside the County.

Heritage organizations also face a variety of challenges, including limited financial and human resources, changing audience needs and expectations, challenges in adapting to and successfully employing new technology, and challenges ensuring that facilities and collections are accessible to visitors.

Heritage Project Background

In 2017, recognizing the common challenges faced by many County heritage organizations, the Board implemented a two-year Heritage Project with the goal of building local capacity and commitment for protecting, enhancing, promoting, and sharing

expertise and resources within Clackamas County. BCS hired a limited-duration, part-time Heritage Project Manager, funding the position with Lottery dollars.

Over the last two years the Heritage Project Manager has worked closely with the heritage organizations in the County and with the Clackamas County Heritage Council (CCHC) to identify heritage organizations' needs, challenges, and accomplishments, and to explore and evaluate various support models which could promote effective stewardship of locally-owned collections and archives, preserve local historic and cultural resources, and help build a sustainable network of financially secure local heritage organizations and institutions. This evaluation has resulted in the creation of the Clackamas County History Hub concept.

Clackamas County History Hub

In brief, a Clackamas County History Hub, could hire experts in key roles that would share services with all of the participating heritage organizations. This would provide a level of expertise that the individual sites currently cannot afford and would greatly increase the organizations' capacity to reach emerging audiences. The Hub would provide staffing resources to assist heritage organizations in areas of primary need including marketing and technology, audience engagement, and fundraising.

The History Hub would be open to all Clackamas County heritage organizations that are either nonprofit organizations with 501(c)3 tax status or government entities. Organizations must be engaged in, and have as their core mission, historical interpretation or preservation.

The Hub could provide Heritage Organizations with much-needed support in key areas, including:

- Responding to the changing nature of visitors' needs and expectations, especially those of younger generations, including:
 - Embracing and utilizing social media and new technologies.
 - Developing more engaging, experiential offerings preferred by younger audiences.
 - Addressing younger audiences' desire for wider, more diverse perspectives of the past.
- Provide additional support for marketing efforts in the local community.
- Enhancing heritage organizations' financial stability and sustainability.
 - Providing additional support for pursuing grant opportunities.
 - Connecting organizations to existing resources for grant funding, other financial support, training opportunities, and adhering to best practices in their fields.
- Enhancing opportunities and ability for heritage organizations to collaborate and cooperate.

The History Hub as envisioned would require a stable, dedicated funding source. While several potential funding models were examined as part of the Heritage Project, the most practical and realistic funding mechanism would be some sort of Special District which could provide the History Hub with a sustainable, permanent revenue source.

The attached report and supplementary material contains additional information about the Heritage Project and the History Hub concept.

Heritage Project next steps

Heritage organizations' passion and dedication are unquestioned, and their input and support has been invaluable in the coordination of the Heritage Project and development of the History Hub concept. Of course, implementation of the History Hub (or any other County-wide support model) would still require refinement and finalization of numerous details, including services offered, participation requirements, and funding sources.

In order to continue refining and finalizing these details, what's needed most is an organization (or organizations) which can and will serve as a champion for further development and support of the History Hub concept. BCS has neither the operational nor financial capacity to continue coordination of the Heritage Project past the project end date of 5/31/19.

FINANCIAL IMPLICATIONS (current year and ongoing):

Is this item in your current budget? YES NO

What is the cost? The Heritage Project was a limited-duration (two-year) project. Over the project's duration, approximately \$115,000 was spent on salary, benefits, and overhead.

What is the funding source? BCS funded the two-year Heritage Project using Oregon Lottery dollars. A funding source for any future Heritage Project work has not been identified.

STRATEGIC PLAN ALIGNMENT:

- How does this item align with your Department's Strategic Business Plan goals?

While BCS recognizes the value of preserving and protecting the County's heritage, we feel that the continued work on the Heritage Project may better align with the strategic goals of another department or organization. In addition, BCS has neither the financial nor operational capacity to continue coordinating the Heritage Project beyond the project's end date of 5/31/19.

- How does this item align with the County's Performance Clackamas goals?

The support provided by the History Hub would support the County's strategic priority of *Building A Strong Infrastructure* by allowing Heritage Organizations to focus more on preserving and developing their collections and facilities, and help create a network of more financially stable and sustainable heritage organizations.

LEGAL/POLICY REQUIREMENTS: None at this time.

PUBLIC/GOVERNMENTAL PARTICIPATION:

OPTIONS:

N/A – Informational update. Funding for the two-year project has ended.

RECOMMENDATION:

N/A – Informational update. Funding for the two-year project has ended.

ATTACHMENTS:


- Heritage Project Report
- Clackamas County History Hub Concept Fact Sheet
- Letters of Support

SUBMITTED BY:

Division Director/Head Approval _____

Department Director/Head Approval _____

County Administrator Approval _____



For information on this issue or copies of attachments,
please contact Jennifer Burns @ ext. 4356

Clackamas County Heritage Project



History Lives in Clackamas County

May 15, 2019

Table of Contents

Overview	4
Clackamas County Heritage Organizations	5
Heritage Project Process.....	8
Heritage Assessment and Survey	9
Trends in the Museum and Heritage Fields	14
Heritage Service Models	15
Clackamas County History Hub Concept.....	17
Why Support Heritage Organizations	23
Appendices	24
Clackamas County Heritage Organizations	25
2017 Clackamas County Heritage Organization Survey (Interview).....	27
Heritage Organization Assessment (Self-Assessment)	28
Emerging Audience Groups	36
The Value of Millennial Visitors.....	37
National Survey of Heritage Funding and Incentive Programs: Opportunities for Oregon.....	38
Article: What happens when a World Heritage City can't support its own heritage?	65
Clackamas County History Hub Fact Sheet: Sustainability, Growth, & Collaboration.....	67
The Value of History	69
Museums as Economic Engines - Oregon.....	70

Cultural Heritage Travelers in Oregon by the Numbers..... 71

Museums as Economic Engines – National 72

Overview

In 2017, recognizing the common challenges faced by many County heritage organizations, the Board of County Commissioners implemented a two-year Heritage Project with the goal of building local capacity and commitment for protecting, enhancing, promoting, and sharing expertise and resources within Clackamas County. Business and Community Services (BCS) hired a limited-duration, part-time Heritage Project Manager, funding the position with Lottery dollars.

Over the last two years, the Heritage Project Manager has worked closely with the heritage organizations in the County and with the Clackamas County Heritage Council (CCHC) to identify heritage organizations' needs, challenges, and accomplishments. The Heritage Project Manager explored and evaluated various support models which could promote effective stewardship of locally-owned collections and archives, preserve local historic and cultural resources, and help build a sustainable network of financially secure local heritage organizations and institutions. This work has culminated with the development of the Clackamas County History Hub concept.

In brief, the Clackamas County History Hub could hire experts in key roles that would share services with all participating organizations. This would provide a level of expertise that the individual sites currently cannot afford and would greatly increase the organizations' capacity to reach emerging audiences. History Hub staff would assist the heritage organizations in the areas of primary need, including marketing and technology, audience engagement, and fundraising.

Clackamas County Heritage Organizations

Home to over 40 historic sites, historical societies, and other heritage organizations, Clackamas County is rich in history. Covering a diverse range of topics from the Ice Age Floods to the early settlement (both Native American as well as pioneer) centered around the Willamette Falls to high-tech motor sports, these heritage organizations offer educational opportunities and preserve and hold valued historical collections in public trust for future generations.

These heritage organizations provide important services to County residents. They deliver unique educational experiences and bring history to life. They serve as keepers of the community's collective memory and care for the County's most important historical treasures. The heritage organizations not only tell the story of the development of the County, but at many sites, the interpretive themes have statewide and national importance. As such, these organizations offer a unique asset to the residents of the County as well as provide a draw for tourists.

Types of Organizations

Museums & Historic Sites

Organizations that are actively engaged in preserving and interpreting historical sites / buildings to the public.

Historical Societies & Interpretive Organizations

Organizations actively interpreting the history of Clackamas County. These organizations differ from the "Sites" category in that they do not maintain physical sites / buildings.

Historic Review Boards

Committees of volunteers appointed to help manage City or County heritage landmarks. Generally located within the planning department of the respective government entity.

Archives & Genealogy Organizations

Organizations that preserve public records or historical documents. They serve as research centers for the general public and provide assistance with family genealogy.

Clackamas County Heritage Council

Believing that they are stronger together, the heritage organizations joined together to form the Clackamas County Heritage Council (CCHC), an organization for peer support and partnership opportunities. Without a staff of its own, the CCHC has difficulty maintaining momentum as each member usually occupies a key role in their own organization.

Clackamas County Heritage Organizations

See Appendix for a full list of Sites and their corresponding Owners / Operators

Sites Open to the Public (26 Represented by 33 Owners/Operators)

- Baker Cabin & Pioneer Church
- Canby Depot Museum
- Cascadia Center for Arts & Crafts
- End of the Oregon Trail Interpretive Center
- Ermatinger House
- Holmes House at Rose Farm
- Hopkins Demonstration Forest (Future home of Molalla Log Bldg.)
- Iron Worker’s Cottage
- Luscher Farm House
- McLean House
- McLoughlin House & Barclay Houses
- Marks Prairie Schoolhouse
- Milwaukie Museum
- Molalla Museum Complex
- Mt. Hood Cultural Center & Museum
- Museum of the Oregon Territory
- Oregon Military Museum
- Oregon City Municipal Elevator
- Oswego Heritage House
- Philip Foster Farm
- Sandy Historical Society & Museum
- Stevens-Crawford House
- Timberline Lodge
- Willamette Falls Locks & Museum
- Willamette Shore Trolley
- World of Speed

Archives & Genealogy Organizations

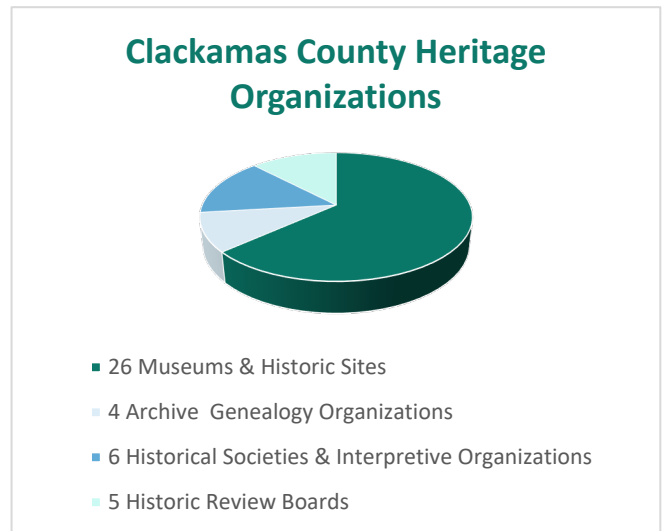
- Clackamas County Family History Society
- Family History Centers (LDS)
 - Lake Oswego Family History Center
 - Milwaukie Family History Center
 - Molalla Family History Center
 - Mount Hood Family History Center
 - Oregon City Family History Center
 - Wilsonville Family History Center
- Holy Names Heritage Center
- Pacific Northwest Mennonite Historical Society

Interpretive Organizations / Historical Societies

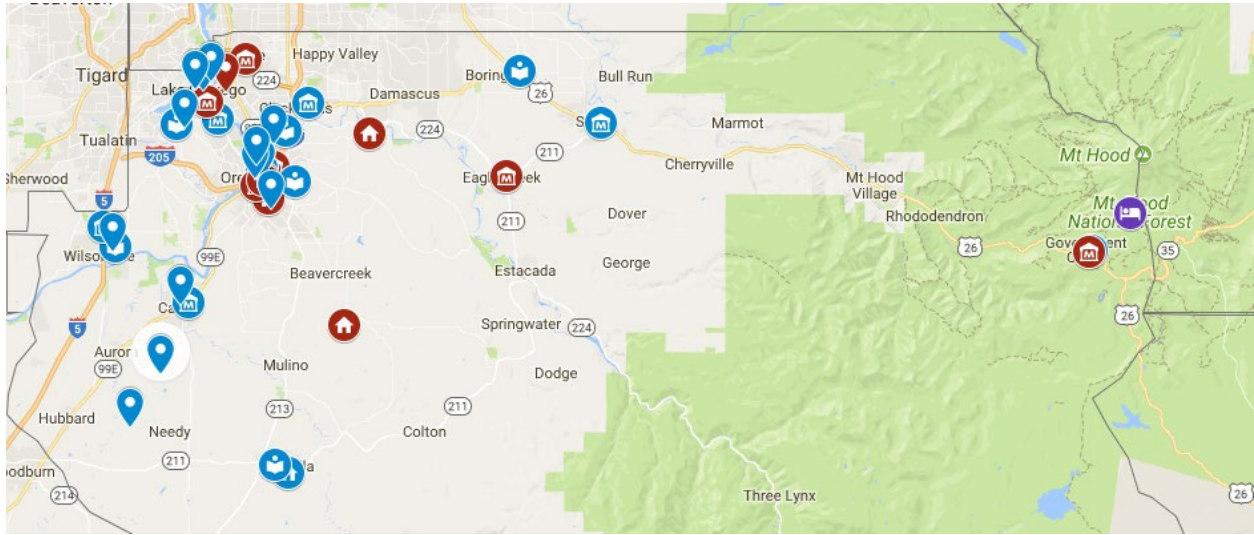
- Gladstone Historical Society
- Oak Lodge History Detectives
- West Linn Historical Society
- Willamette Falls Heritage Area Coalition
- Willamette Falls Heritage Foundation
- Wilsonville-Boones Ferry Historical Society

Historic Review Boards

- City of Canby Heritage & Landmark Commission
- City of Lake Oswego Historic Resources Advisory Board
- City of Oregon City Historic Review Board
- City of West Linn Historic Review Board
- Clackamas County Historic Review Board



County Heritage Organization Map



Heritage Project Process

Many of Clackamas County's heritage organizations face the same challenges experienced across the field: securing stable funding, facilitating collaborative efforts, and meeting the expectations of a twenty-first century audience. In the past, some of the heritage organizations have sought individual financial assistance from the County. One of the goals of the heritage project was to identify a solution that would address the heritage organizations' needs and challenges collectively.

Steps Taken

1. Surveyed Organizations and completed a needs assessment
2. Studied best practices and trends in the museum field
3. Researched funding and support models within and outside the museums / historic preservation fields
4. Drafted the Clackamas County History Hub concept with input from the Clackamas County Heritage Council (CCHC)

Heritage Assessment and Survey

To determine the common needs of the heritage organizations, the Heritage Project Manager interviewed the heritage organizations. Each organization was also asked to fill out a Heritage Organization Assessment to establish a baseline and better assess the state of the heritage organizations in the County. The Survey and Assessment were based on industry standards and the American Association of State and Local History’s assessment program.

Survey Results

The top needs identified were:

- Marketing & Technology: Adapting to and successfully employing new technology
- Financial and human resources
- Ensuring that facilities and collections are accessible to all visitors

In the interview portion of the survey, respondents were asked to select the areas in which they needed assistance and what specifically would help their organization be more successful. In both questions, a list was provided to select from and the respondent could select more than one answer.

What areas do you need assistance in?	What can be provided to your organization to be more successful?
<ul style="list-style-type: none"> • 70% Marketing • 58% Fundraising • 50% Institutional Planning • 42% Visitor Services 	<ul style="list-style-type: none"> • 93% Marketing • 64% Tech Support • 57% Exhibits • 43% Staff • 36% Collections Storage

Additional findings of note:

- Heritage organizations have a strong interest in collaborating with one another.
- Most Sites rely on 1-2 key staff or volunteers. Volunteers are critical to the success of nonprofits. Without professional staff to train volunteers in more technical skills, it can be difficult for them to keep up with best practices.
- Organization resources are stretched thin and they lack the capacity to coordinate large-scale collaborative efforts.
- Heritage organizations desire to improve in the areas of audience engagement. The organizations recognize the need to attract younger populations and utilize technology. For many, they just are not sure how to do so.
- During the peak season from May 15 to September 15 the organizations have operating hours in common that can be marketed. Previously it was assumed that the organizations did not have reliable schedules.

- Fewer organizations initially reported needing assistance with collections, exhibitions, and programming. However, these topics were brought up throughout the survey or issues were noted during site visits. In the areas of collections and exhibitions, it can be difficult for volunteer-based organizations to be familiar with best practices.

Adapting to and successfully employing new technology

Heavily influenced by their peers and social media, younger generations require heritage organizations to embrace technology and social media. Sometimes referred to as “generation click”, to this segment of the population, if it isn’t digital, it doesn’t exist. For sites without the capacity to keep websites current or post engaging content, they may be easily overlooked. Once onsite, this segment expects more engaging, individualized experiences. However, it is increasingly expensive to create high-quality visitor experiences and to care for collections and historical structures. The Museum of the Oregon Territory (MOOT) has collaborated with local colleges to create exhibits using cutting edge technology. These types of exhibits can be cost-prohibitive to some and have significant ongoing maintenance expenses. There is also the challenge of remaining current with the speed of development occurring in technology. For example, while some of the heritage organizations are just figuring out how to effectively use Facebook, the user trend is moving away from that platform and moving towards Instagram and SnapChat.

Stable Funding

Many of the organizations depend upon volunteers for leadership and grant funding for their budgets. Preservation standards for historic structures require highly skilled craftsmen. Likewise, managing the care of objects to ensure they survive, not just for our children, but for our grandchildren’s grandchildren can be an expensive endeavor. Even the County’s large organizations face challenges with gaps in their funding as they work to create high-quality visitor experiences.

Unfortunately, grant funding tends to be project-based and often does not address the overhead or operational issues that may be preventing the organizations from better serving the public. In addition, there is a tendency in struggling organizations to chase after grant money, taking on projects in order to apply for grants, rather than making strategic decisions. If they succeed in obtaining a grant, it may take time and money away from more mission-centric initiatives. Many granting organizations are restrictive in what they fund. Additionally, the more complex the grant, the more difficult it often is for the smaller heritage organizations to apply.

The Cultural Coalition and County Tourism have generously assisted with grants as they can, but are limited as to what they can fund. In 2017, the Clackamas County Arts Alliance awarded 17 grants to arts, heritage, and humanities totaling \$35,471. Heritage organizations have also taken part in funding opportunities provided by Clackamas County Tourism. Even with these generous grants, donations from individuals, and earned income, some of the heritage organizations still struggle for financial stability.

In some cases, heritage organizations would not be open, or exist at all, if it were not for the generosity of volunteers willing to share their time. However, availability of volunteers limits operational hours, forcing the heritage organizations to close during slow seasons or certain days of the week. For tourists traveling during the winter or even mid-week during the summer, this can be a frustrating experience.

Meeting the Needs of a Changing Audience

See Appendices for more information on Changing Audiences and Millennial populations. Like similar organizations across the United States, County heritage organizations struggle to reach emerging audience groups (millennials, “minority majorities”, and affordable access audiences). These younger, more diverse populations depend more on technology and social media in how they identify and partake in new opportunities, creating challenges for heritage organizations that are not tech savvy.

Another commonly noted problem with the County’s heritage organizations is that many are not visitor-ready. With a dependence upon volunteers, some organizations only provide diminished or inconsistent hours. They also lack the manpower to develop new exhibits and experiences that might encourage repeat visitors. Because the organizations are not visitor-ready year-round they can be difficult for Tourism to promote.

Ensuring that facilities and collections are accessible to all visitors

An increasingly more diverse population offers new opportunities and challenges for heritage organizations. They challenge heritage organizations to reinterpret exhibits and provide displays that incorporate a wider perspective of the past. Historic sites face an added challenge of balancing the integrity of historic structures and maintaining authentic environments with creating accessible sites. Rainy winters and unheated primitive buildings add to the physical challenges to their site. With visitors’ increasing reliance on technology, heritage organizations also need to ensure that their websites are mobile compatible and ADA compliant. Compliance in this area can involve expensive consultants or higher skilled volunteers.

Collaboration

Overwhelmingly, the most frequent comment was that the organizations wanted to collaborate with their colleagues and other organizations. While the heritage organizations realize that they are stronger together, they often lack the capacity to facilitate that coordination. As one survey respondent in a destination marketing survey contracted by Willamette Falls Heritage Area Coalition stated, “We are so busy doing our own things, that it is hard to organize other things even though the value of this happening is fully recognized.”

Operating Hours

During the peak season from May 15 to September 15 the organizations have hours in common that can be marketed. Previously it was assumed that the organizations did not have consistent

operating hours. There is still work that can be done to coordinate further and market these shared times. Additionally, reliance on volunteer staffing results in occasional last minute closures that are challenging to avoid without having staff members to fill in. Many of the heritage organizations' volunteers are very active within their community and often have full schedules.

Heritage Organization Operating Hours
<ul style="list-style-type: none">• 23 Sites / Museums are open to the public• 21 sites are open with advertised hours• Between May 15 – September 15, many sites have common operating hours:<ul style="list-style-type: none">• 1st Saturday of the Month, 1-4pm (20 sites open)• Saturdays 1-4pm (19 sites open)• Friday & Saturday 1-4pm (17 sites open)

Visitation Data

Source: "Schedule Drives Visitation to Cultural Organizations And Nobody Is Talking About It (DATA)." Colleen Dilenschneider, 25 Jan. 2019, www.colleendilen.com/2016/04/06/schedule-is-the-top-influencer-of-visitation-to-cultural-organizations-and-nobody-is-talking-about-it-data/.

- Schedule is the single biggest factor contributing to visitation (not cost or specific content). If a visitor-serving organization is not operating when people can or want to visit, then those people aren't going to visit.
- Attendance loss from unexpected closures is greater than most organizations realize (and it is not generally replaced)
- When an organization is closed at a time when people might otherwise expect it to be open, visitation generally is NOT displaced to other times of the year. And, to top it off, we lose more people than simply those who had planned to attend the organization that day.

Willamette Falls Heritage Area Coalition (WFHAC) Marketing Survey

The brand marketing study performed by Bill Baker of Total Destination Marketing occurred at about the same time as the Heritage Project survey. With the heritage organizations occupying an important role in the future Willamette Falls Heritage Area, the study provided an interesting

perspective and echoed many of the findings noted above. A few of the items of note mentioned in their presentations:

- Overstretched human and financial resources
- Seasonality and limited hours
- Need for improved websites and connecting through technology (online presence may not be enticing or providing right info).
- Fragmentation and operating separately – limited resources, no time, treading water. *“We are so busy doing our own thing, that it is hard to organize other things. Even though the value of this happening is fully recognized.”*
- Need to elevate capacity of many museums

Trends in the Museum and Heritage Fields

Preserving historical buildings, objects, and stories for future generations and interpreting the past come with a variety of challenges for the organizations entrusted with these roles. These challenges are not unique to the heritage organizations in Clackamas County. Across the field, museums and heritage organizations struggle with the same concerns: how to engage an increasingly younger and more diverse audience, funding, and utilizing the full capabilities of technology on a limited budget.

Emerging Audiences

See Appendix on Emerging Audience Groups

Studies show that while visitation of cultural organizations is on the rise, the challenge is in keeping pace with the population growth. Museums are seeing negative substitution of the museum visitor: traditional audiences (older and less diverse) are not being replaced with the emerging populations (younger and more diverse).

In order to grow their audiences and keep pace with population growth, heritage organizations need to cultivate three emerging audiences: Millennials, minority majorities, and affordable access populations. The good news is that younger audiences are interested in history. In fact, they are more mission-driven than Gen-X or Baby Boomers.

The challenge is that younger audiences have different expectations, motivations, and communication styles than their predecessors. Heavily influenced by social media and technology, this demographic challenges heritage organizations to interact and engage using new technologies. Added to the difficulties heritage organizations face is that the technology can be beyond their limited budgets and/or may come with steep learning curves for volunteer-dependent organizations.

Heritage Service Models

See Appendix for additional funding models presented in the National Survey of Heritage Funding and Incentive Programs.

The following alternatives were reviewed to determine the solution which would best address the needs expressed in the heritage survey. Additionally the start of the Heritage Project coordinated with the publication of Oregon Heritage's study on funding programs (see appendix). The purpose of the research project was to identify state, county, and local incentive and funding programs for the broad heritage community in Oregon including historic sites, Main Street organizations, preservation organizations, historic cemeteries, archeological sites, and museums. The goal of this effort is to inspire Oregon stakeholders to undertake additional research to possibly implement a few of these programs in their town, county, or at the statewide level.

Direct Funding to Individual Organizations / Sites

This model is similar to how Multnomah County funds Oregon Historical Society and four east county organizations.

Challenges

Under this funding model, organizations duplicate efforts (staff & resources). In addition, the model doesn't foster collaboration.

The sheer number of sites in Clackamas County would reduce the amount that each organization would receive. In Multnomah County a few small organizations receive funds through the levy. However, their portion is not large enough to address both staff and programming needs, forcing the organizations to choose.

The heritage organizations in Clackamas County face the same challenges of needing staff assistance as well as funds to expand their services. Additionally, one concern with this approach is that each organization would likely hire a similar position of a museum director expected to act as a generalist, resulting in organizations duplicating efforts.

Another option could be to allocate funds on an application basis. One of the challenges to this distribution mechanism is that the heritage organizations would lack a reliable revenue stream and the amounts awarded could vary widely between years. Additionally, some of the organizations that are volunteer-run and already struggling lack the time or volunteers to write grant applications.

Existing Organization Hires Staff

An existing organization could hire a Heritage Coordinator or Grant Writer to provide services and support to other County heritage organizations.

Challenges

One person may not have the bandwidth to keep current with all of the activities of all sites and their related organizations. In addition, without additional assistance, especially in the areas of marketing and technology, the organizations will struggle to capture and retain audiences. A Coordinator could facilitate trainings and advise the organizations. However, the marketing and technology needs are ongoing rather than one-time projects easily solved via training.

Consolidate into a Single Clackamas County Heritage Organization

Organizations would consolidate into a single, 501(c)3 entity (either a new entity, or combining with an existing Heritage Organization).

Challenges

There is a history of failed attempts at consolidation. In addition, there is no organization currently stable enough to take this on. There are also concerns amongst heritage organizations about losing unique character and community connections that exist currently, and small sites fear being overshadowed.

Create a new entity to provide core services (History Hub)

Addresses core needs and encourages collaboration where feasible and efficient. See Appendix: What happens when a World Heritage City can't support its own heritage? for a proposal of a similar model in Philadelphia, PA.

Benefits

A History Hub would provide core services while allowing independent autonomous heritage organizations to focus on their missions and communities. Organizations would maintain individual status as 501c3 or government entity.

Clackamas County History Hub Concept

(See Appendix: History Hub Concept Fact Sheet)

The purpose of History Hub is to solve the challenges heritage organizations face related to reliable funding and collaborative efforts between organizations. A subset of these issues is meeting the expectations of a twenty-first century audience in order to remain relevant. The History Hub is still in a conceptual phase with the specific details, requirements, and benefits to be shaped by the needs of the participating organizations.

Goals

- Build a collaborative relationship to preserve and promote the County's rich history.
- Establish stable funding for heritage organizations.
- Provide shared services such as technology, marketing, and fundraising.
- Facilitate collaboration between organizations
 - Identify shared services and resources to increase the organizations' purchasing power. Areas identified include: technology, marketing, and fundraising.
- Improve the visitor experience
 - Assist the heritage organizations in reaching their full potential to better serve the public and develop these unique community assets. Offer improved accessibility and support for front door staff. Provide staff assistance in the areas of audience engagement, helping organizations develop programs and exhibits that appeal to a diverse audience.
- To better preserve and promote the County's rich history and assist member organizations in capacity building and serving the needs of the residents of Clackamas County. Meeting the needs of a changing audience.

Operations

The History Hub model provides member organizations with common core services. The History Hub organization would consolidate funding and hire experts in key roles that would share their services with all of the participating heritage organizations. This model would provide a level of expertise that the individual sites currently cannot afford and would significantly increase the organization's capacity to reach emerging audiences. History activities and support would be focused on capacity building and prioritize projects based on collaboration efforts.

Additionally, the History Hub would create a History Award program to foster the general awareness of preservation and history throughout the County. The History Award program would promote and recognize the service and restoration efforts by the general public, businesses, and other organizations.

Core Services

The History Hub would provide staffing resources to assist heritage organizations in areas of their greatest need as identified in the Heritage Organization Survey. The focus areas include: marketing and technology, audience engagement, and development/fundraising. Services at this level would be fulfilled and coordinated by History Hub staff.

Marketing & Technology

- Consolidate local (<50 mile radius) marketing efforts
- Create and provide digital content
- Engage the public and promote activities via social media and online

Audience Engagement

- Enhance volunteer programs
- Assist organizations in developing programming to reach a wider audience.

Development (Fundraising)

- Leverage public support to provide additional services.
- Provide grant writing assistance for participating organizations, emphasizing those projects that involve collaboration.
- Promote sponsorships across organizations to encourage higher levels of support and offer a larger audience for potential sponsors.

Secondary Services

Services provided at this level would be fulfilled through mentorship programs and coordinating outside service providers either as consultants or by offering workshops. History Hub staff would work with organizations to connect them to existing opportunities (ex. History Mentor Corp). To promote activities in-line with current scholarship and best practices, History Hub would join professional organizations and share publications and training opportunities with the participating heritage organizations.

Operations

- Board training.
- Strategic planning
- Providing access to current scholarship and training opportunities
- Working to leverage purchasing power

Curatorial

- Collection and exhibition planning
- Shared collections management software
- Coordinating public exhibits that bring the Museums to the community.
- Depending on the needs/interests of participating organizations, possibly exploring a shared collections storage space

Historic Preservation

- Provide funding to update Historic Building Inventories
- Support outreach and educational opportunities
- Promoting Preservation activities
- Funding for Historic Review Board training

Additional items that could be considered for the History Hub:

- Support outreach and educational opportunities
- Revolving loan fund / fund to aid economically disadvantaged residents (cover app fees or provide grants for materials and labor)
- Stipends for interns to draft national register nominations
- Update historic inventories (first step in preserving historic resources)
- Incentives for protecting historic resources – make it economically more viable. (ex. Conservation easement fund)
- Marker fund

History Award Program

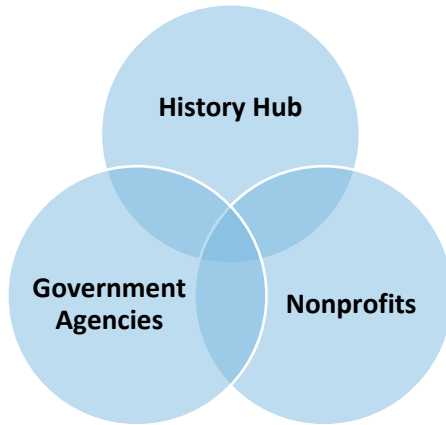
Promoting and recognizing service and restoration efforts by individuals, businesses and other organizations within the County.

Sample Staffing Model

- **Heritage Project Manager**
Facilitate coordination between organizations, Curatorial (collections and exhibition) assistance. The Heritage Project Manager would oversee History Hub staff.
- **Audience Engagement Specialist**
Public programming assistance (onsite & offsite), visitor readiness, volunteer management
- **Digital Marketing Coordinator**
Marketing content, web assistance, social media
- **Development Officer**
Grant writing for history Hub activities and for participating members, Sponsorship/Corporate Giving, membership, special events and facility rentals
- **Administrative Support**

Key Partners

The History Hub would focus on filling service gaps not provided by other organizations. The intent of the History Hub is to work collaboratively with the existing organizations and entities that assist heritage organizations. For example, the History Hub could serve as a single point of contact and assist other nonprofits, government agencies, or organizations in reaching out to or working with over 40 organizations.



Sample List of Potential Partners

- Clackamas County Arts Alliance
- Clackamas County Tourism
- Confederated Tribe of Grand Ronde
- Oregon Heritage
- Oregon Museum Association
- The National Trust
- Willamette Falls Heritage Area

Eligible Participants

See Appendix for a complete list including names of associated Owner / Operators

The History Hub's goal is to serve the Heritage Organizations of Clackamas County which may include the following organizations and sites:

- 26 Museums and Historic Sites owned/operated by 33 different organizations
- 6 Interpretive Organizations / Historical Society without sites open to the public
- 5 Historic Review Boards
- 4 Archives & Genealogy Organizations

Benefits to Heritage Organizations (conceptual)

Still in the conceptual phase, the History Hub benefits will be influenced by the participating organizations.

Organization Type	Benefits
All Heritage Organizations	<ul style="list-style-type: none"> • Grants based on operational budget • Grants for special projects (Focused on capacity building & collaboration) • Access to History Hub (Staff, projects/programs, materials) • Heritage Preservation Awards
Sites & Museums	<ul style="list-style-type: none"> • Lost Revenue Reimbursement for Free Admission & Discounted School Programs • Heritage Preservation Awards

Benefits Provided to Clackamas County Residents (conceptual)

- Heritage Preservation Awards
- Free admission to participating organizations
- Discounted School Programs (onsite & outreach) for schools within the County
- Improved experiences at area heritage organizations

Requirements of Participating Organizations (conceptual)

Heritage Organizations participating in History Hub will be asked to commit to the following items

- Free admission for Clackamas County Residents
- Discounted school programs (onsite & outreach) for schools within County.
- Complete/Update a Heritage Assessment Survey annually.
- Track & report performance metrics.
- Commit to minimum hours open to the public
- Commit to one newsletter/blog article per year
- Maintain active membership in the Clackamas County Heritage Council
- Attend 75% of CCHC meetings annually (either in person or via phone)
- History Hub staff member as a non-voting, ex-officio member of organization’s board.

Clackamas County History Hub Funding

The Clackamas County History Hub would require a dedicated, stable revenue source to fund operations. As part of the Heritage Project work, different funding options were explored, including fundraising events/sponsorships, grants, and County General Fund support.

The likeliest option for providing a dedicated, stable funding source would be a voter-approved County Heritage District or other type of Special District. Predictable, permanent revenue from a District would provide stable funding for History Hub activities.

Additional work would be required to evaluate options for a District, evaluate public support for a District, and coordinate efforts to prepare a future ballot measure for voter approval.

Why Support Heritage Organizations

Much like parks or libraries, the County’s heritage organizations are community assets that provide intangible benefits. They are the repositories of important artifacts and preserve and promote the collective memory of the communities they serve. Without additional support, these organizations will struggle to survive and the communities they serve will be at risk for losing their collective memory. History Hub would aid the organizations in capacity building, creating stronger organizations to better serve the public.

“Museums create social values, provide a sense of place, enrich the lives of locals and draw tourists. They contextualize current topics, create a stronger sense of community, and provide a more in-depth understanding of who we are and how we’ve changed over time. They offer educational opportunities and are some of the most trusted sources of information. They hold their historical collections and buildings in public trust for the use of future generations. . They also provide a – “bequest value” – that comes from protecting / creating the thread between the past and future generations. Information from a 2012 Oregon Heritage Commission Survey.

Museums and other nonprofit cultural organizations return more than \$5 in tax revenues for every \$1 they receive in funding from all levels of government.”
– 2012 American for the Arts ‘Arts and Economic Prosperity IV’

For additional information, please see the following appendices:

- The Value of History
- Museums as Economic Engines - Oregon
- Cultural Heritage Travelers in Oregon by the Numbers
- Museums as Economic Engines – National

Appendices

Clackamas County Heritage Organizations

Heritage Assessment

2017 Clackamas County Heritage Organization Survey (Interview)

Heritage Organization Assessment (Self-Assessment)

Emerging Audience Groups

Heritage Service Models

National Survey of Heritage Funding and Incentive Programs: Opportunities for Oregon

Article: What happens when a World Heritage City can't support its own heritage?

Clackamas County History Hub Concept

Clackamas County History Hub Fact Sheet: Sustainability, Growth, & Collaboration

Why Support Heritage Organizations

The Value of History

Cultural Heritage Travelers in Oregon by the Numbers

Museums as Economic Engines – National

Museums as Economic Engines - Oregon

Clackamas County Heritage Organizations

Museums & Sites (26)	Owner/Operator(s) (33)	Type
Baker Cabin & Pioneer Church	Baker Cabin Historical Society	501(c)3
Canby Depot Museum	Canby Historical Society	501(c)3
Cascadia Center for Arts & Crafts	Cascadia Center for Arts & Crafts	501(c)3
End of the Oregon Trail Interpretive Center	Clackamas Heritage Partners	501(c)3
Ermatinger House	City of Oregon City, Parks & Rec. Friends of the Ermatinger House	Gov-City NA
Holmes House at the Rose Farm	McLoughlin Memorial Association	501(c)3
Hopkins Demonstration Forest (Molalla Log Building)	Forests Forever, Inc. Molalla Log Cabin Project	501(c)3 NA
Iron Worker's Cottage	City of Lake Oswego Lake Oswego Preservation Society	Gov-City 501(c)3
Luscher Farm	City of Lake Oswego, Parks & Rec.	Gov-City
McLean House <i>(Primarily used for event rentals)</i>	City of West Linn Friends of the McLean House	Gov-City 501(c)3
McLoughlin House & Barclay House	National Park Service McLoughlin Memorial Association	Gov-Fed 501(c)3
Marks Prairie Schoolhouse	Marks Prairie Schoolhouse Hist. Society Mark Prairie Heritage <i>(Family history)</i>	501(c)3 501(c)3
Milwaukie Museum	Milwaukie Historical Society	501(c)3
Molalla Museum Complex	Molalla Area Historical Society	501(c)3
Mt. Hood Cultural Center & Museum	Mt. Hood Cultural Center & Museum	501(c)3
Museum of the Oregon Territory (MOOT)	Clackamas County Historical Society	501(c)3
Oregon Military Museum	US Army Oregon Military Mus. Project/Foundation	Gov-Fed 501(c)3
Oregon Municipal Elevator	City of Oregon City Downtown Oregon City	Gov-City 501(c)3
Oswego Heritage House	Oswego Heritage Council	501(c)3
Philip Foster Farm	Jackknife-Zion-Horseheaven H.S.	501(c)3
Sandy Historical Society Museum	Sandy Historical Society	501(c)3
Stevens-Crawford House	Clackamas County Historical Society	501(c)3
Timberline Lodge`	Forest Service R.L.K. and Company Friends of Timberline Lodge	Gov-Fed For Profit 501(c)3
Willamette Shore Trolley	Oregon Electric Railway Historical Soc.	501(c)3
Willamette Falls Locks and Museum	US Army Corps of Engineers	Gov-Fed
World of Speed	World of Speed	501(c)3

24-501(c)3, 9-Gov

Clackamas County Heritage Organizations

Archives & Genealogy Organizations (4)

- Clackamas County Family History Society
- Family History Centers (LDS)
 - Lake Oswego Family History Center
 - Milwaukie Family History Center
 - Molalla Family History Center
 - Mount Hood Family History Center
 - Oregon City Family History Center
 - Wilsonville Family History Center
- Holy Names Heritage Center
- Pacific Northwest Mennonite Historical Society (Mennonite)

Historical Societies and Interpretive Organizations (6)

- Gladstone Historical Society (not a 501(c)3)
- Oak Lodge History Detectives (501(c)4)
- West Linn Historical Society (501(c)3)
- Willamette Falls Heritage Area Coalition (501(c)3)
- Willamette Falls Heritage Foundation / Friends of the Locks (501(c)3)
- Wilsonville-Boones Ferry Historical Society (501(c)3)

Historic Review Boards (5)

- City of Canby Heritage & Landmark Commission
- City of Lake Oswego Historic Resources Advisory Board
- City of Oregon City Historic Review Board
- City of West Linn Historic Review Board
- Clackamas County Historic Review Board

2017 CLACKAMAS COUNTY HERITAGE ORGANIZATION SURVEY

ORGANIZATION: _____

ID #: _____

INTERVIEWEE: _____

DATE: _____

Q. IF YOU HAD THE RESOURCES TO SUCCEED / BE MORE SUCCESSFUL, WHAT WOULD SUCCESS LOOK LIKE?

Q. HOW DOES YOUR ORGANIZATION CURRENTLY MEASURE PERFORMANCE?

Q. WHAT ROADBLOCKS ARE IN YOUR WAY OF SUCCESS / SUSTAINABILITY?

Q. WHAT AREAS DO YOU NEED ASSISTANCE IN? (CHECK ALL THAT APPLY, AND CIRCLE ANY SUB-CATEGORIES)

- MISSION, VISION, GOVERNANCE:** MISSION, GOV. DOCS, GOVERNING AUTHORITY, ETHICS, SUPPORT GROUPS
- MANAGEMENT:**
FISCAL RESPONSIBILITY, FUNDRAISING, SUSTAINABILITY, FACILITIES, SAFETY & SECURITY, VISITOR AMENITIES,
RISK MANAGEMENT, COMPLIANCE WITH LAWS, CODES, & REGULATIONS, INSTITUTIONAL PLANNING, JOB
PERFORMANCE EVALUATION, RECORDS MANAGEMENT & INSTITUTIONAL ARCHIVES
- AUDIENCE:** MARKETING & PR, AUDIENCE & VISITOR RESEARCH, COMMUNITY RELATIONS, VISITOR SERVICES
- INTERPRETATION:** PROGRAMS, EXHIBITIONS, PUBLICATIONS
- COLLECTIONS:**
POLICIES, MANAGEMENT, PLANNING, INSTITUTIONAL ARCHIVES, CARE & PREVENTATIVE CONSERVATION,
CONSERVATION TREATMENT, RESEARCH, PUBLIC ACCESS, EMERGENCY PREPAREDNESS
- HISTORIC STRUCTURES:**
MANAGEMENT, PRESERVATION, POLICIES, RESEARCH AND DOCUMENTATION, PUBLIC ACCESS, PUBLIC SAFETY
- OTHER:** _____

Q. WHAT CAN THE COUNTY PROVIDE YOUR ORGANIZATION TO BE MORE SUCCESSFUL?

- | | | |
|----------------------------------------------|-------------------------------------------|---------------------------------------------|
| <input type="checkbox"/> STAFF | <input type="checkbox"/> EXHIBIT MATERIAL | <input type="checkbox"/> ECONOMIES OF SCALE |
| <input type="checkbox"/> TRAINING | <input type="checkbox"/> MARKETING | (EX. SUPPLIES, MERCH.) |
| <input type="checkbox"/> SPACE | <input type="checkbox"/> TECH SUPPORT | <input type="checkbox"/> OTHER: _____ |
| <input type="checkbox"/> COLLECTIONS STORAGE | | _____ |

Q. ROLE OF CCHC – HOW CAN A JOINT ORGANIZATION HELP YOUR SITE?

Q. WEBSITE RESOURCES FOR HERITAGE ORGANIZATIONS - WHAT KINDS OF INFO WOULD YOU LIKE TO SEE ON A WEBSITE AND HAVE AVAILABLE TO THE PUBLIC? _____

Q. OUT OF THE BOX IDEAS FOR HERITAGE IN CLACKAMAS COUNTY – HOW TO MAKE IT STRONGER

Q. ADDITIONAL HERITAGE ORGANIZATIONS/GROUPS TO TALK TO?

Q. ANYTHING ELSE YOU WOULD LIKE TO ADD? _____

HERITAGE ORGANIZATION ASSESSMENT

ORGANIZATION INFORMATION

ORGANIZATION NAME: _____

MUSEUM(S) AND/OR SITE(S): _____

SITE(S) ADDRESS(ES): _____

OWNER OF MUSEUM(S) AND/OR SITE(S): _____

MAILING ADDRESS: _____

PHONE: _____ FAX: _____

EMAIL: _____ WEBSITE: _____

YEAR OPENED / BEGUN: _____ 501(c)3 GOVERNMENT ENTITY

ORGANIZATION TYPE:

- | | | |
|-------------------------------------------------------|---------------------------------------------|----------------------------------------------|
| <input type="checkbox"/> HISTORIC / INTERPRETIVE SITE | <input type="checkbox"/> WALKING TOUR | <input type="checkbox"/> CHAMBER OF COMMERCE |
| <input type="checkbox"/> MUSEUM | <input type="checkbox"/> REVIEW BOARD | <input type="checkbox"/> MAIN STREET |
| <input type="checkbox"/> GARDEN | <input type="checkbox"/> HISTORICAL SOCIETY | <input type="checkbox"/> OTHER: _____ |

INTERPRETATION TYPE:

- | | |
|------------------------------------------------------|-------------------------------------------------------|
| <input type="checkbox"/> INTERPRETIVE DISPLAYS | <input type="checkbox"/> SECOND-PERSON INTERPRETATION |
| <input type="checkbox"/> GUIDED TOURS | <input type="checkbox"/> THIRD-PERSON INTERPRETATION |
| <input type="checkbox"/> FIRST-PERSON INTERPRETATION | <input type="checkbox"/> OTHER: _____ |

EXECUTIVE DIRECTOR OR SENIOR STAFF MEMBER/ VOLUNTEER: _____

PHONE: _____ CELL: _____

EMAIL: _____ HOURS PER WEEK: _____

BOARD PRESIDENT: _____

PHONE: _____ CELL: _____

EMAIL: _____

NUMBER OF EMPLOYEES: PART-TIME: _____ FULL-TIME: _____

LIST POSITIONS (NOTE STAFF (S) OR VOLUNTEER (V)): _____

NUMBER OF BOARD MEMBERS: _____ HOURS VOLUNTEERED LAST FY: _____

NUMBER OF VOLUNTEERS: _____ HOURS VOLUNTEERED LAST FY: _____

NUMBER OF INTERNS: _____ HOURS VOLUNTEERED LAST FY: _____

TOTAL HOURS VOLUNTEERED LAST FY: _____ VOLUNTEER TIME IN DOLLARS (x \$24.15¹): _____

AFFILIATED ORGANIZATIONS / MEMBERSHIPS: _____

MISSION STATEMENT (OR ATTACH AS SEPARATE DOCUMENT): _____

¹ "The Value of Volunteer Time." *Independent Sector*, 24 May 2017, www.independentsector.org/resource/the-value-of-volunteer-time.

MISSION, VISION, AND GOVERNANCE (MVG)

GOVERNING DOCUMENTS

- MISSION STATEMENT
- VISION STATEMENT
- BY-LAWS
- CODE OF ETHICS
- CONFLICT OF INTEREST STATEMENT
- ORGANIZATIONAL CHART
- JOB DESCRIPTIONS WITH ROLES & RESPONSIBILITIES (BOARD, STAFF, VOLUNTEER)
- STRATEGIC PLAN
- LENGTH OF PLAN: _____
- CURRENT YEAR OF PLAN: _____
- AUDIENCE & COMMUNITY PARTICIPATED IN PLANNING PROCESS

POLICIES

- FINANCIAL
- INVESTMENT
- PERSONNEL (PAID & UNPAID STAFF)
- COLLECTIONS
- CONSERVATION
- EXHIBITION
- INTERPRETATION
- PUBLIC USE & ACCESS
- RIGHTS AND REPRODUCTIONS
- FACILITY RENTAL
- VISITOR SERVICES / CUSTOMER CARE
- SECURITY
- RECORD RETENTION SCHEDULE / STORAGE OF GOVERNING DOCUMENTS (ONSITE & OFFSITE)

GOVERNING AUTHORITY

- REVIEWS ITS OWN COMPOSITION AND TRACKS PERFORMANCE.
- ACTIVELY RECRUITS NEW MEMBERS WITH NEEDED SKILLS AND WHO REFLECT THE INSTITUTION'S AUDIENCES AND COMMUNITY. (TIME, TALENT, MONEY, DIVERSITY).
- COMMITTS TO HAVING A GOVERNING AUTHORITY MEMBER WHO HAS FINANCE CREDENTIALS.
- COMMITTS TO HAVING A GOVERNING AUTHORITY MEMBER WHO HAS LEGAL EXPERTISE.
- FINANCIAL STATEMENTS UPDATED MONTHLY.
- REVIEWS FINANCIAL REPORT AT EVERY MEETING.
- GOVERNING AUTHORITY MEMBERS COMMIT TO OBLIGATIONS (TIME, MONEY).
- GOVERNING AUTHORITY MEMBERS ARE ENCOURAGED TO MAKE A PERSONAL FINANCIAL CONTRIBUTION.
- ACTIVELY SOLICITS FUNDS FOR THE INSTITUTION.
- ORIENTATION PROVIDED FOR GOVERNING AUTHORITY MEMBERS.
- BOARD MANUAL PROVIDED FOR EACH GOVERNING AUTHORITY MEMBER.
- THE GOVERNING AUTHORITY RECOGNIZES ITS REPORTING REQUIREMENTS, AND ITS RESPONSIBILITY TO ENSURE THE INSTITUTION'S FINANCIAL STABILITY AND SUSTAINABILITY.
- SUCCESSION PLAN FOR FUTURE LEADERSHIP WITHIN THE GOVERNING AUTHORITY AND STAFF.
- CREATES POLICY AND DELEGATES AUTHORITY FOR DAY-TO-DAY OPERATIONS TO LEAD STAFF MEMBER / VOLUNTEER.

RISK MANAGEMENT

- DIRECTORS AND OFFICERS LIABILITY INSURANCE
- BUILDING INSURANCE
- FINE ARTS / COLLECTIONS INSURANCE
- GENERAL LIABILITY INSURANCE
- KEY AUDIT
- IRS, EMPLOYMENT, AND OTHER FORMS AND REPORTS FILED COMPLETELY AND ON TIME.

PUBLICATIONS

ANNUAL REPORT

MANAGEMENT (MGMT)

FISCAL RESPONSIBILITY

- ADOPTED BUDGET (ATTACH LAST AND CURRENT FISCAL YEAR)
- ANNUAL FINANCIAL STATEMENTS (ATTACH LAST FISCAL YEAR)

BUDGET

FISCAL YEAR: CALENDAR YEAR OTHER: _____

TOTAL REVENUE BUDGET: _____

EARNED INCOME: _____	GOVERNMENT GRANTS: _____
DONATIONS: _____	NON-GOVERNMENT GRANTS: _____
OTHER: _____	

EARNED INCOME BREAKDOWN:

DOOR RECEIPTS: _____	GIFT STORE: _____
PROGRAM FEES: _____	RENTALS: _____
MEMBERSHIP: _____	OTHER: _____
SPONSORSHIP: _____	

TOTAL EXPENSE BUDGET: _____

COLLECTIONS CARE / MGMT.: _____	PR / MARKETING: _____
HISTORIC STRUCTURES / LANDSCAPES: _____	FACILITIES: _____
EXHIBITS: _____	ADMINISTRATION: _____
PROGRAMMING: _____	OTHER: _____
SALARIES: _____	

FUNDRAISING AND LONG-TERM SUSTAINABILITY

- DEVELOPMENT / FUNDRAISING PLAN
 - ANNUAL FUNDRAISING EVENT: _____
 - MEMBERSHIP PROGRAM
COST/LEVEL: _____
 - PLANNED GIVING PROGRAM
 - ENDOWMENT (CURRENT VALUE: _____)
- CURRENT FUNDRAISING STRATEGIES / PROGRAMS: _____

FACILITY CARE AND VISITOR AMENITIES

BUILDING SQUARE FOOTAGE OCCUPIED:

EXHIBITS SPACE SQ. FT.: _____	COLLECTIONS SPACE SQ. FT.: _____
-------------------------------	----------------------------------

- OWNED
- LEASED (ANNUAL RENT: _____)
- FACILITY MAINTENANCE PLAN
- SEASONAL INSPECTION OF BUILDINGS & GROUNDS

INTERNAL CONTROLS FOR PROPER FINANCIAL MANAGEMENT

- SEGREGATION OF DUTIES TO PROVIDE CHECKS AND BALANCES ON ALL FINANCIAL TRANSACTIONS.
- CHECKS WRITTEN IN AN AMOUNT HIGHER THAN ESTABLISHED THRESHOLDS REQUIRE TWO SIGNATURES.
- ANNUAL INDEPENDENT FINANCIAL REVIEW OR AUDIT.

JOB PERFORMANCE EVALUATION

- REGULAR STAFF (PAID & UNPAID) PERFORMANCE EVALUATION
- PERSONNEL MANUAL
- VOLUNTEER MANUAL

AUDIENCE STANDARDS (AUD)

AUDIENCE & VISITOR DATA

- | | |
|-----------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> VISITATION DATA (STARTING YEAR: _____) | <input type="checkbox"/> PROGRAM SURVEYS |
| <input type="checkbox"/> WEBSITE STATS (DATA TRACKED: _____
_____) | <input type="checkbox"/> AUDIENCE DEMOGRAPHICS
DATA TRACKED (EX. AGE, GENDER, RACE,
ZIP CODE, GROUPS, OTHER): _____) |
| <input type="checkbox"/> MEMBERSHIP | TRACKING METHOD (EX. GUESTBOOK, DAILY
VISITOR LOG, OTHER): _____) |
| <input type="checkbox"/> DONOR INFORMATION | |
| <input type="checkbox"/> GENERAL VISITOR SURVEY | |

IN-PERSON ENGAGEMENT (PLEASE ENTER DATA FROM LAST FISCAL YEAR)

- | | |
|----------------------------------------------|--------------------------------------------|
| EXHIBITIONS CURRENTLY OFFERED (NUMBER): | (PERMANENT: _____ TEMPORARY: _____) |
| IN-PERSON VISITS: _____ | NUMBER OF SCHOOL GROUPS: _____ |
| NEWSLETTER AUDIENCE: _____ | NUMBER OF CHILDREN IN SCHOOL GROUPS: _____ |
| PEOPLE SERVED BY EDUCATIONAL PROGRAMS: _____ | NUMBER OF PROGRAMS OFFERED: _____ |

DIGITAL ENGAGEMENT (PLEASE ENTER DATA FROM LAST FISCAL YEAR. ATTACH ANALYTICS BY MONTH)

- | | |
|-------------------------|--------------------------|
| WEBSITE VISITORS: _____ | TWITTER FOLLOWERS: _____ |
| FACEBOOK FANS: _____ | TWITTER ACCOUNTS: _____ |
| FACEBOOK PAGES: _____ | YOUTUBE VIEWS: _____ |
| | INSTAGRAM: _____ |
| | OTHER: _____ |

AUDIENCE & VISITOR DATA ANALYSIS

- VISITOR INFORMATION ANALYZED TO DETERMINE TRENDS AND VISITATION PATTERNS.
- VISITOR INFORMATION ANALYZED TO GAUGE INTEREST IN PROGRAMS/EXHIBITS.
- THE INSTITUTION REVIEWS FEEDBACK FROM AUDIENCES THAT PARTICIPATE IN ITS PROGRAMS AND ACTIVITIES.
FEEDBACK METHOD: _____

VISITOR SERVICES

- | | | |
|-------------------------------------------------|-----------------------------------------------|-----------------------------------------------------------|
| <input type="checkbox"/> EXHIBITS (STATIC) | <input type="checkbox"/> PUBLICATIONS | <input type="checkbox"/> FOOD |
| <input type="checkbox"/> EXHIBITS (INTERACTIVE) | <input type="checkbox"/> WEBSITE | <input type="checkbox"/> WI-FI |
| <input type="checkbox"/> VIDEO CONTENT | <input type="checkbox"/> SOCIAL MEDIA CONTENT | <input type="checkbox"/> SEATING AREAS |
| <input type="checkbox"/> RESEARCH LIBRARY | <input type="checkbox"/> MUSEUM STORE | <input type="checkbox"/> ROADWAY / DIRECTIONAL
SIGNAGE |
| <input type="checkbox"/> TOURS | <input type="checkbox"/> RENTAL SPACE | <input type="checkbox"/> BUS PARKING |
| <input type="checkbox"/> PROGRAMS | <input type="checkbox"/> RESTROOMS | <input type="checkbox"/> TELETALES SIGNAGE |
| <input type="checkbox"/> EVENTS | <input type="checkbox"/> WATER | |

VISITOR INFORMATION

- POSTED OPERATIONAL DAYS / TIMES OPEN TO THE PUBLIC: _____
- ADMISSION CHARGED & LEVELS: _____
- VOICEMAIL WITH HOURS OF OPERATION
- WEBSITE WITH BASIC VISITOR INFORMATION (HOURS, LOCATION, CONTACT INFO.)
- FRONT DESK STAFF/VOLUNTEERS TRAINED IN CUSTOMER SERVICE

AUDIENCE STANDARDS (AUD) CONTINUED

COMMUNITY RELATIONS

Q HOW DOES THE INSTITUTION RESPOND TO DEMOGRAPHIC, ECONOMIC, SOCIAL, AND POLITICAL CHANGES IN THE COMMUNITY AND REGION? _____

Q WHAT OTHER GROUPS IN THE COMMUNITY DOES THE INSTITUTION WORK WITH? _____

THE FACILITY IS AVAILABLE FOR COMMUNITY MEETINGS AS APPROPRIATE.

MARKETING AND PR METHODS

- | | |
|-----------------------------------------------|------------------------------------------------------------------|
| <input type="checkbox"/> NEWSLETTER | <input type="checkbox"/> SOCIAL MEDIA (FACEBOOK, TWITTER, OTHER) |
| <input type="checkbox"/> PRESS RELEASE | <input type="checkbox"/> EMAIL DISTRIBUTION LIST |
| <input type="checkbox"/> MEDIA | <input type="checkbox"/> OTHER: _____ |
| <input type="checkbox"/> WEBSITE | _____ |
| <input type="checkbox"/> BROCHURE / RACK CARD | |

MARKETING AND PR TOOLS

- | | |
|----------------------------------------------|----------------------------------------------------------------|
| <input type="checkbox"/> LOGO | <input type="checkbox"/> PRESS / PUBLICATION PHOTOS |
| <input type="checkbox"/> STATIONARY | <input type="checkbox"/> MARKETING PLAN |
| <input type="checkbox"/> BUSINESS CARDS | <input type="checkbox"/> MEDIA POLICY |
| <input type="checkbox"/> CONSISTENT BRANDING | <input type="checkbox"/> ASSIGNED SPOKESPERSON / PRESS CONTACT |

DESCRIPTION OF ORGANIZATION (25 TO 75 WORDS):

INTERPRETATION (INT)

PROGRAMS, EXHIBITIONS, PUBLICATIONS**GEOGRAPHIC AREA COVERED:** _____**PERIOD OF SIGNIFICANCE:** _____**MAJOR THEMES:** _____**EXHIBITS**TEXT WRITTEN: IN-HOUSE CONTRACTED OUTEXHIBIT FABRICATION: IN-HOUSE CONTRACTED OUT**INTERPRETIVE CONTENT**

- EXHIBITION PLAN
- INTERPRETIVE PLAN
- THE ORGANIZATION IS INVOLVED IN THE CURRENT ISSUES AND ACTIVITIES OF ITS COMMUNITY SO THAT ITS PROGRAMS AND OFFERINGS ARE RELEVANT.
- UTILIZES ADVISORY COMMITTEES OR FOCUS GROUPS.
- USES CURRENT SCHOLARSHIP AND APPROPRIATE HISTORICAL METHODS.
- ACTIVELY SEEKS OUT NEW AUDIENCES AND INCLUDES THEM IN DEVELOPING CONTENT.
- SEEKS ASSISTANCE FROM SCHOLARS AND KNOWLEDGEABLE SPECIALISTS.
- EDUCATIONAL PROGRAM DEVELOPED USING STATE STANDARDS AND CURRICULUM GUIDELINES.

INTERPRETIVE METHODS / TECHNIQUES

- USES A VARIETY OF PRESENTATION TECHNIQUES
 - EXHIBIT LABELS
 - SIGNAGE
 - INTERACTIVE DISPLAYS
 - PRINTED MATERIALS
 - DEMONSTRATIONS
 - ELECTRONIC MEDIA
 - PERFORMANCES
 - EDUCATIONAL PROGRAMS
 - OTHER: _____
- OFFERS A VARIETY OF PROGRAMS AND EXHIBITIONS THAT APPEAL TO DIFFERENT AGES AND INTERESTS.
- DEVELOPS DIFFERENT PROGRAMS AND EXHIBITIONS THAT SUIT DIFFERENT LEARNING STYLES.
- PROVIDES MATERIAL / TEXT IN SECONDARY LANGUAGE(S).
LANGUAGES: _____
- ADA ACCESSIBLE

DOCENTS

- DOCENT MANUAL
- DOCENT TRAINING PROVIDED

EVALUATION CONDUCTED

- FRONT-END
- FORMATIVE
- REMEDIAL
- SUMMATIVE

PROGRAMS

ANNUAL PROGRAMS: _____

STEWARDSHIP OF COLLECTIONS (COLL)

POLICIES

- COLLECTIONS ARE APPROPRIATE TO MISSION
- CRITERIA FOR ACCEPTING & REFUSING ITEMS
- INCOMING LOAN POLICY
- OUTGOING LOAN POLICY
- ALL LOANS ARE FOR A SPECIFIED TIME PERIOD.
- PROCEDURES FOR DEACCESSION & DISPOSAL
- CONTROLLED ACCESS TO COLLECTIONS
- PROVIDES PUBLIC ACCESS TO COLLECTIONS

MANAGEMENT

- COLLECTIONS PLAN
- DESIGNATED STAFF / VOLUNTEER RESPONSIBLE FOR COLLECTIONS
- COLLECTIONS INVENTORY PROCEDURE (LAST PERFORMED: _____)
- COLLECTIONS REGISTRATION AND CATALOGING SYSTEM
METHOD / PROGRAM: _____
- NUMBERING / LABELING SYSTEM FOR HANDS-ON COLLECTIONS
- COLLECTIONS REVIEWED TO IDENTIFY THOSE COLLECTIONS TO WHICH LAWS AND REGULATIONS APPLY (EX. NAGPRA).
- THE INSTITUTION HAS IDENTIFIED THE LEGAL STATUS OF EACH ARTIFACT AND ARCHIVAL ITEM.
- BACK-UP COPIES OF COLLECTIONS RECORDS STORED OFFSITE.

COLLECTIONS STATS

COLLECTIONS:	TOTAL: _____	ADDED IN LAST FY: _____
OBJECTS:	TOTAL: _____	ADDED IN LAST FY: _____
LIBRARY VOLUMES:	TOTAL: _____	ADDED IN LAST FY: _____
ARCHIVAL CUBIC FEET:	TOTAL: _____	ADDED IN LAST FY: _____
OBJECTS DIGITIZED:	TOTAL: _____	ADDED IN LAST FY: _____
ABANDONED PROPERTY:	TOTAL COLLECTIONS: _____	TOTAL OBJECTS: _____
FOUND-IN-COLLECTIONS:	TOTAL OBJECTS: _____	

COLLECTIONS STORAGE:

- DESIGNATED SECURED STORAGE AREA
- CLIMATE CONTROLLED (TEMP. / REL. HUMIDITY)
- LIGHT CONTROLLED
- INSTITUTIONAL ARCHIVE
- LOCATED OFFSITE
- LOCATED ONSITE

COLLECTIONS CARE AND PREVENTIVE CONSERVATION

- ENVIRONMENTAL CONDITIONS MONITORED IN EXHIBITION AREAS
 - LIGHT
 - TEMPERATURE
 - RELATIVE HUMIDITY
- INSTITUTION MONITORS & CONTROLS PESTS
- ARCHIVAL STORAGE MATERIAL USED
- ARCHIVAL EXHIBIT MATERIAL USED
- HOUSEKEEPING PLAN
- HOUSEKEEPING TRAINING PROGRAM
- CONDITION REPORTS
- EMERGENCY PREPAREDNESS PLAN
- DISASTER KIT(S)
- STAFF & VOLUNTEERS TRAINED IN HANDLING COLLECTIONS
- FOOD, DRINK, & PLANT MATERIALS LIMITED TO SPECIFIC AREAS.

CONSERVATION TREATMENT AND DOCUMENTATION

- CONSERVATION PROJECTS CONDUCTED ONLY UNDER THE GUIDANCE OF A PROFESSIONALLY TRAINED CONSERVATOR.
- MAINTAINS RECORDS OF ALL CONSERVATION TREATMENTS

STEWARDSHIP OF HISTORIC STRUCTURES AND LANDSCAPES (HSL) (AASLH SPECIFIC)

POLICIES

- HISTORIC STRUCTURES AND LANDSCAPES OWNED /MANAGED BY THE INSTITUTION ARE MISSION APPROPRIATE.

PRESERVATION

- CONDUCTS APPROPRIATE AND ROUTINE MAINTENANCE AND HOUSE- / GROUNDS-KEEPING.
- THE INSTITUTION USES AN INTEGRATED PEST MANAGEMENT PROGRAM FOR ITS HISTORIC STRUCTURES AND LANDSCAPES.
- ALL BUILDINGS AND STRUCTURES ARE INSPECTED ANNUALLY.
- THE INSTITUTION USES APPROPRIATE PROFESSIONAL TREATMENTS AND MATERIALS IN THE CARE OF ITS HISTORIC STRUCTURES AND LANDSCAPE FEATURES.
- QUALIFIED PROFESSIONALS ARE CONSULTED BEFORE PLANNING OR BEGINNING WORK ON STRUCTURES OR LANDSCAPES.
- THE INSTITUTION DOCUMENTS ALL TREATMENTS.
- THE INSTITUTION HAS, AND USES, AN UP-TO-DATE EMERGENCY / DISASTER PLAN.

RESEARCH AND DOCUMENTATION

- THE INSTITUTION HAS COPIES OF, AND UNDERSTANDS, ALL LEGAL DOCUMENTS RELATED TO THE PROPERTIES IT MANAGES OR OWNS.
- THE INSTITUTION HAS AN ESTABLISHED SYSTEM FOR ACCESSIONING, DOCUMENTING, AND CATALOGING PORTIONS OF HISTORIC STRUCTURES THAT MIGHT BE REMOVED FOR REPLACEMENT-IN-KIND.
- QUALIFIED PROFESSIONALS ARE ENGAGED TO RESEARCH AND DOCUMENT THE HISTORIC STRUCTURES AND LANDSCAPES.

HISTORIC BUILDINGS:

BUILDING	YEAR BUILT	ARCHITECTURAL STYLE	LANDMARK STATUS (CITY, COUNTY, STATE, NATIONAL)

ORIGINAL LOCATION (IF MOVED):

BUILDING	ORIGINAL SITE

HISTORIC REVIEW BOARDS:

NUMBER OF DESIGNATED PROPERTIES:

TOTAL: _____ ADDED IN LAST FY: _____

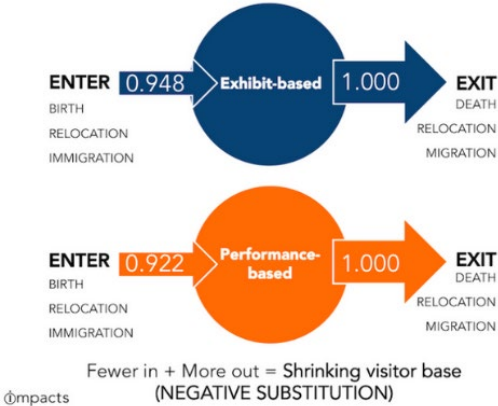
Emerging Audience Groups

Information compiled from: Dilenschneider, Colleen. www.colleendilen.com.

The US population is increasing, but visitation is on the decline.

This is in large part due to the negative substitution of the historic visitor. To remedy this condition, we must change the profile of our historic visitor.

Today, for every one historic visitor that leaves the market, they are being replaced with less than one visitor. Or, for every thousand people leaving the market, only 948 similar historic visitors are replacing them.



Organizations must cultivate new visitors from three emerging audience groups.

1. Millennials
2. Minority majorities (generally, people of ethnic and racial backgrounds that differ from historic visitors)
3. Affordable access audiences

Strategic Framework for engaging emerging audiences

MAPS

A strategic framework for engaging emerging audiences

- Underscore **mission**
- Understand **access opportunities**
- Create **personalized programs**
- Facilitate **shared experiences**

www.colleendilen.com

The Value of Millennial Visitors

Information compiled from: Dilenschneider, Colleen. www.colleendilen.com.

Millennials are cultural organizations' most frequent and loyal visitors...but this audience remains underserved. Here's why that's a big problem for the future well-being of the industry.

- Millennials are the most frequent attendees to cultural organizations

Millennials ARE NOT attending at the minimum expected levels. In other words, cultural organizations are underserving millennial audiences by a factor of nearly 24%.

Not only that, underperforming the opportunity by 24% with this particular audience puts us in a doubly bad place because of this generation's attributes and its word-of-mouth-informed visitation cycles.

Millennials are the most loyal audiences with the highest lifetime value

Because millennial high-propensity visitors are *crazy* "super-connected." This means that we are empowered to recommend experiences with a collective reach that's like "traditional media" on steroids. "Super-connected" means that these folks are most likely to have access to – and be engaged with – the web at home, at work, and/or on mobile devices.

- Data suggest that millennial visitors are an organization's most loyal – and they do much more loyalty-driving work for organizations than older audiences.
- Millennial visitors are most likely to come back sooner.
- Millennial visitors are more likely to spread positive word of mouth about cultural organizations to drive visitation.
- Millennial visitors reach more people.

Millennials DON'T Ruin Everything – Here's Why They May Be Your Most Important Visitors

- 1) Millennial visitors are more racially and ethnically diverse than non-millennial visitors.
- 2) Millennial visitors are even more likely to have graduated from college than non-millennial visitors
- 3) Millennial visitors are not generally low-income individuals
- 4) Millennial visitors are more likely to actively support causes
- 5) Millennial visitors are more likely to be cord-cutters who donate to nonprofits online

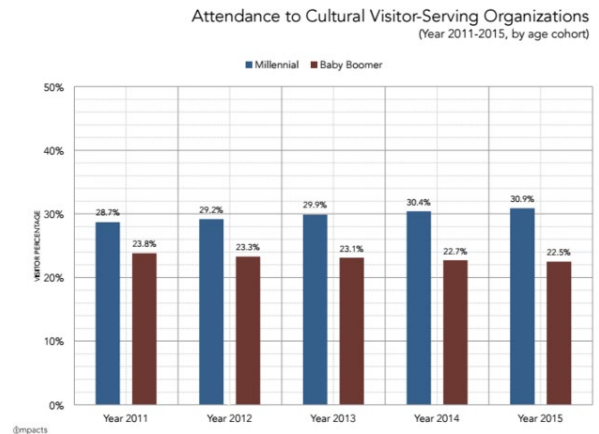


TABLE OF CONTENTS

Introduction and Purpose of Research Project.....	2
Overview of Profiled Projects.....	2
Overview of Funding Programs.....	4
State Income Tax Credits	
Oklahoma State Income Tax Credit for Commercial Properties.....	6
Virginia State Income Tax Credit for Residential Properties.....	6
State and Local Business Tax Credits	
Missouri Neighborhood Assistance Program.....	8
Washington State Main Street Tax Credit Program.....	8
New Jersey Historic Trust.....	9
Philadelphia PA Community Development Corporation Tax Credit Program.....	9
State Special Taxing Districts	
Oregon Special District.....	11
Property Tax Freezes/Local Property Tax Surcharge	
Massachusetts Community Preservation Act Local Property Tax Surcharge.....	12
Illinois Property Tax Freeze for Residential Properties.....	13
Class L Property Tax Incentive, Cook County IL.....	13
Gaming Revenues	
Colorado State Historical Fund Program Matching Grants.....	15
Direct Funding from State Governments	
Minnesota Historical Society Grant Programs.....	16
Direct Funding from Statewide Nonprofit Organizations	
Illinois Landmarks Illinois Preservation Heritage Fund Grant Program.....	17
Loan Funds	
Maryland Heritage Area Authority Loan Program.....	18
Maryland Historic Preservation Loan Fund for Capital Projects.....	18
Endowments	
New Jersey Cultural Trust Matching Grants for Endowments.....	20
Other Incentives or Funding for Heritage Projects	
Oregon Cultural Trust Grant Programs.....	21
Bergen County New Jersey Heritage Trust Fund.....	22
Snohomish County WA Community Heritage Grants.....	22
Maryland Traditions Grants.....	23
Vermont Downtown and Village Center Sales Tax Reallocation Program.....	23
Cook County Illinois Permit Fee Waiver Program.....	24
Conclusion.....	25
Next Steps.....	25
Credits.....	25

INTRODUCTION

This research project for Oregon Heritage is part of the preparation for their first ever Heritage Summit held on April 26 and 27, 2017. The purpose of the research project was to identify state, county, and local incentive and funding programs for the broad heritage community in Oregon including historic sites, Main Street organizations, preservation organizations, historic cemeteries, archeological sites, and museums. The goal of this effort is to inspire Oregon stakeholders to undertake additional research to possibly implement a few of these programs in their town, county, or at the statewide level.

For each of the funding sources we profile in this publication, we describe the funding available each year (if known),

which projects are eligible to use the funding/incentive, a brief description about how the funding/incentive works, a photo/graphic and caption describing a project that used the funding/incentive, and a link to the website with the most comprehensive information to learn more about the funding/incentive program. The information in these profiles is meant as a starting point for those who might be curious to learn more about them.

We hope these 22 profiles will inspire Oregon community leaders to replicate some of these creative funding programs across the nation at the state, county, and local level to support more heritage activity in Oregon.

OVERVIEW OF PROFILED PROJECTS

Heritage Consulting Inc. undertook this research in February and March 2017 and uncovered a wide variety of funding and incentive programs for heritage projects being used at the state, county, and local level across the country. Our initial research was meant to provide an overview of the funding and incentive programs for heritage work nationwide.

For our research, we checked the websites of the following organizations for information to compile our spreadsheet: National Trust for Historic Preservation, National Park Service, National Council of Preservation Commissions, Advisory Council on Historic Preservation, and Preservation Action. We were hoping to find if any one of these entities maintained any kind of national database or list of preservation funders or local or statewide incentives, and were surprised that there was fragmentary information available from each source.

We undertook Google searches for “state funds for historic house museums” for example, and were surprised to find that mostly federal funding programs such as the Institute of Library and Museum Services and the National Endowment for Humanities were listed. When we searched further down in the listings, we noted that some preservation or heritage funders have specific program that support house museums or cemeteries, or archeology and have noted these in the profiles. State Arts and Humanities Councils are also funders of collections care and programming at historic sites and museums. The Utah Division of State History was one of the few places that offered \$10,000 matching grants to historic cemeteries, but these were for digitization of cemetery records.¹ Much more time would be needed to identify funders of cultural entities at the state or local level.

1 <https://heritage.utah.gov/history/cemetery-grants-program>

The private website Preservation Directory was helpful. So was the web site for the Wisconsin Historical Society, which offered a selection of 42 mostly Wisconsin based public and private foundation funding programs and incentives, as well as some national sources.² This web site appears to be kept up to date, so it would be a good resource for anyone looking for other funding ideas and resources. Maryland Historical Trust has a similar list of local, statewide, and national funding sources on their web site as a PDF document.³

In our research, we also looked for Master’s Theses for several of the older and larger historic preservation programs, thinking that surely a student had written a thesis that covered this topic. But we were surprised that there were only a handful of thesis topics on preservation incentives or funding programs, mostly limited in time frame, state, or building type. We learned through our research that few states offer as wide a range of grant support as Heritage Oregon offers now for Oregon historic properties, Main Streets, museums, historic cemeteries or archeology.

Our research was undertaken entirely online and was not exhaustive, but uncovered about 150 incentive or funding programs worthy of review. We captured basic information on each of these programs on a spreadsheet. This base line research can be found at <http://www.oregon.gov/oprd/HCD/FINASST/Pages/index.aspx>.

The 22 programs that we profile in this document were chosen by both Donna Ann Harris of Heritage Consulting Inc. and Kuri Gill, Grants & Outreach Coordinator with

2 <http://www.wisconsinhistory.org/Content.aspx?dsNav=Ro:20,N:1210&dsNavOnly=N:1210>

3 http://mht.maryland.gov/documents/PDF/grants/Grants_Funding_Sources.pdf

OVERVIEW OF PROFILED PROJECTS

Oregon Heritage. We chose these programs to profile because they were considered the best example of their type by noted experts, used an out of the ordinary revenue source, or would be a new incentive or funding type that might be useful in Oregon.

The funding/incentive programs that support historic preservation we profile seemed to fall into the following categories.

1. State Income Tax Credits
2. State Business Tax Credits
3. State Special Taxing Districts
4. Property Tax Freezes/ Local Property Tax Surcharge
5. Gaming Revenues
6. Direct Funding from State Governments
7. Direct Funding from Statewide Preservation Organizations
8. Loan Funds for Preservation Activities
9. Matching Funds for Endowments for History Organizations
10. Other Incentives or Funding for Heritage Projects

Application Forms

These funding programs/incentives all have application forms. Some must be filled out online, while others are still paper based. The application forms themselves vary widely. Some seem to be easy to complete by a local advocate while others will require architects, consultants, or someone with highly specialized knowledge. We note in the profiles if we think the application is particularly difficult, such as the Cook County Class L Permit Fee Waiver Program, which requires a proforma schedule.⁴

All the tax credit programs we profile here have substantial application packets. The Property Tax Freeze Program for Residential Properties in Illinois permits “do it yourself” rehabbers to value their labor at the minimum wage or at a professional wage for their projects (i.e. a plumber can charge his hourly rate for plumbing only, not for hanging drywall) to meet a minimum requirement for investment in the property.

4 https://www.cityofchicago.org/content/dam/city/depts/zlup/Historic_Preservation/Publications/Class_L_Application_Document_2014.pdf.

Matching Funds

None of the programs profiled here offer outright grants with no matching requirement. Most programs require cash match on a one to one basis or have matching formulas based on the size of the applicant organization. The paperwork required for substantiating the cash match can be substantial. A few states permit volunteer labor to match their grants, and Maryland provides paperwork that explains how to fill out volunteer timesheets to substantiate this requirement using Independent Sector’s value of a volunteer hour amount for that state.⁵

Project Eligibility

The funding programs/incentive programs we profile here all have minimum requirements for support. For cultural funding programs, there are requirements about the types of organizations or collections that these funders will support. If the project is for an historic building, then most of the funders require that the historic property/site/museum must be eligible or listed on the National Register of Historic Places or be considered contributing to a National Register Historic District. Some of these programs we profile permit the property to be a local landmark or have may other requirements. We note these requirements in the profile

State Income Tax Credits

Oregon is one of 16 states that does not yet have a State Income Tax Incentive Program for commercial properties that mirrors the Federal 20% Historic Preservation Tax Credit Program for income producing properties. Our profile of the Oklahoma Historic Preservation Tax Credit Program identifies why it is considered one of the best of the 34 state tax credit programs across the country. Oklahoma’s state tax credit program is also used frequently for small scale rehabilitation projects as would be found in local Main Street programs, making it flexible for all types of commercial rehabilitation projects.

We learned in our research that 23 states now have State Income Tax Credit Programs for Residential Properties, and we profile Virginia’s program here. These state tax credit programs for residential historic properties are highly popular as there is no parallel federal tax credit for homeowners.

5 <http://independentsector.org/resource/the-value-of-volunteer-time/>.

OVERVIEW OF FUNDING PROGRAMS

State Business Tax Credits

Three of the state business tax credit programs in Washington, Missouri, and Philadelphia offer unrestricted operating support for downtown organizations to promote their Main Street efforts.

The Missouri Neighborhood Assistance Program is especially generous, offering **\$16 million** in tax credits annually. A wide group of businesses are eligible to participate. Their donations can go to local nonprofits engaged in economic development, as well as arts, health, or other programs. Applications are made yearly. The Washington State Main Street Tax Credit Program provides up to **\$1.5 million** annually for local Main Street programs and for the statewide coordinating program. Philadelphia, PA's Community Development Corporation Tax Credit Program offers **\$100,000** in business tax credits yearly through a ten-year partnership with 42 Community Development Corporations undertaking economic development programs throughout the city.

In 2014, 65% of voters approved a ballot referendum to change the New Jersey state constitution to permit a small portion of the NJ corporate business tax to be allocated yearly to the New Jersey Historic Trust and other open space, farmland preservation organizations to provide matching grants. The New Jersey Historic Trust uses their four percent (4%) of the allocation each year for planning and capital construction projects for historic properties, cemeteries, house museums including churches.

State Special Taxing Districts

The Oregon law that allows for the creation of "heritage districts" is not widely used, and we profile it here to bring it more attention. This law permits local historical societies and museums in one or multiple counties to band together to create a heritage district and ask voters to fund it by an annual tax for all residents of the district.

Property Tax Freezes / Local Property Tax Surcharge

Several states have developed highly successful local property tax freeze programs to encourage rehabilitation of historic structures. The Illinois Property Tax Freeze program encourages rehabilitation of residential landmark properties by fixing the property taxes to pre-rehabilitation rates for up to 12 years. Massachusetts Community Preservation Act permits local government to increase the local property tax surcharge by up to 3% to fund matching grants that support historic preservation projects among other local programs. In Illinois, the Class L Property Tax Incentive program

permits several classes of designated landmarks, including commercial, industrial, not-for-profit, and multi-family residential buildings (but not homeowners), the opportunity to reduce their property tax assessments for 12 years.

Gaming Revenues

Colorado State Historical Fund Program Matching Grants for Preservation Projects has existed since 1990 and has funded more than **\$273 million** in grants from gaming revenue. A very wide variety of projects including archeology is supported with these grant funds.

Direct Funding from State Governments

The highly-regarded Minnesota Historical Society offers Minnesota Historical and Cultural Heritage Grants that support history collections care and management, reproduction, interpretive programs and public education, museum and archives environments, oral history, research and writing, and publications.

Direct Funding from Statewide Nonprofit Organizations

Landmarks Illinois is a statewide preservation organization. Since 2004, they have offered small matching grants (under \$2500) from their annual operating budget through their Preservation Heritage Fund Grant Program. These grants fund preservation efforts for historically, culturally, or architecturally significant structures across the state.

Loan Funds

Maryland and several other states and municipalities have loan funds for preservation projects. The Maryland Heritage Area Authority Loan Program offers loans to nonprofit organizations, local jurisdictions, individuals, and businesses located within the 13 state designated heritage areas to further preserve the area's history, enhance heritage attractions, or support visitor services. The Maryland Historical Trust Capital Loan Program was created to encourage the preservation of historic properties by providing a source of funding. Loans are offered to local jurisdictions, nonprofit organizations, business entities, and individuals that assist and encourage efforts to acquire and preserve historic properties.

Endowments

We also looked for programs that incentivized the creation or expansion of permanent endowments for historic organizations, especially local preservation organizations,

OVERVIEW OF FUNDING PROGRAMS

historic sites, or house museums. The New Jersey Cultural Trust offers matching grants to history organizations that receive large gifts (\$100,000 or more) for their endowments.

Other Incentives or Funding for Heritage Projects

The final category is a host of funding and incentive programs, but they are all quite interesting.

Oregon Cultural Trust is funded through donations made by members of the public in exchange for a **100% state income tax credit** for their charitable giving to the Trust. Grants are made to a wide variety of cultural and heritage organizations/tribes through three annual grant programs.

All but two of the 21 New Jersey counties have enacted county bond funds to provide matching grants for a broad range of preservation projects. We highlight the Bergen County NJ Trust Fund because they permit a very wide range of planning and preservation projects including house museums. Snohomish County, WA in Washington state allocates an amount of the document recording fees collected by the Snohomish County Auditor to fund their historic preservation projects throughout the county. In Maryland, the Maryland Traditions Program offer small grants for folklore and folklife programs around Maryland's traditional arts and crafts.

In Vermont, the state Downtown Development Board permits new construction projects in 24 downtowns to reallocate sales taxes on commercial building materials to the municipality to be used for infrastructure improvements for the new construction project. And finally, in Cook County Illinois, the Permit Fee Waiver Program allows landmark properties to forgo the fees paid for certain construction permits.

Learn More

These profiles represent a wide range of funding types and approaches to encourage owners to rehabilitate and improve the interpretation of historic sites and museums, historic cemeteries, Main Street organizations, and archeological sites. We invite you to learn more about each program by using the live links in the PDF version of this document.

STATE INCOME TAX CREDITS FOR COMMERCIAL PROPERTIES

Oklahoma 20% State Historic Preservation Tax Credits - Commercial

In 1992, the Oklahoma Legislature enacted the Local Development Act to provide state rehabilitation tax credits to historic hotels and newspaper plants. The program was expanded in 2005 by HB 3024 to allow other income-producing historic buildings to take advantage of a 20% state income tax credit for eligible commercial and rental residential properties that qualify for the federal 20% historic preservation tax credit. To qualify for the state tax credit, which is often used in conjunction with the federal 20% historic preservation tax credit, the application must first receive written approval from the National Park Service that the project will be a “certified rehabilitation” of a “certified historic structure.”⁶

Oklahoma is one of 34 states with a state tax credit, and is among the most successful owing to several key factors: no aggregate annual caps, no individual project caps, transferability, and carry forward. Unlike other state tax credit programs, one of the benefits of the Oklahoma tax credit is the absence of a statewide aggregate or per-project caps.⁷ The Oklahoma tax credit is also freely transferable for five years, which allows the party that earns the credit to sell it outright to a third party with an adequate tax liability to use it. It is furthermore also able to be applied against state taxes due for 10 years, in what is called a “carry forward.”⁸

In 2016, PlaceEconomics analyzed the impact of the Oklahoma state tax credit program between 2001 and 2015. Their report found that, during that period, 77 historic

“The study found that every \$1 awarded in tax credits catalyzed \$11.70 in economic activity.”

buildings across 18 counties had been rehabilitated using the tax credit, with \$415 million in rehabilitation expenditures and a total project investment of \$520 million. Although the average project investment was over \$6.8 million, one-third of the projects had budgets of less than \$500,000, indicating its success for smaller-scale commercial properties as well as large properties. In addition to spurring additional investment, the rehabilitation of these buildings generated more than 3,230 direct jobs and 3,500 indirect and induced jobs, for



The 21c Museum Hotel, Oklahoma City, rehabilitated using Oklahoma's 20% state historic preservation tax credit. Source: NewsOk.com. <http://newsok.com/article/5499488>.

an average of 450 jobs per year. Overall, the rehabilitation of these buildings generated direct salaries and wages of almost \$167 million and indirect and induced wages of almost \$143 million. The study found that every \$1 awarded in tax credits catalyzed \$11.70 in economic activity, and the Oklahoma treasury received more than 50% of the money back before the credit was even awarded. The study concluded that, if historic preservation tax credit projects were a single industry, it would be among the largest five percent of all firms in Oklahoma.⁹

Learn more at <http://www.okhistory.org/shpo/factsheets/fs14tax.pdf>.

Virginia State Historic Preservation Tax Credits - Residential

Virginia is one of only 23 states that offers a state tax credit for residential property rehabilitation.¹⁰ This is especially important given the lack of a federal tax credit for non-income-producing properties. Virginia's 25% tax credit is available for owner-occupied residential properties that are on the national and Virginia state registers of historic places. To qualify for the VA state credit, reconstruction and/or other improvements must amount to at least 25% of the assessed value of the owner-occupied building, and follow *the Secretary of the Interior's Standards for Rehabilitation*.¹¹

⁹ <http://www.placeeconomics.com/wp-content/uploads/2017/01/TFA-OklahomaHistoricTaxCredit-ImpactStudy-Web.pdf>.

¹⁰ <http://forum.savingplaces.org/HigherLogic/System/DownloadDocumentFile.ashx?DocumentFileKey=54e27df7-1135-ce87-4bc7-41ea6e55f70d&forceDialog=0>.

¹¹ http://dhr.virginia.gov/tax_credits/tax_credit_faq.htm.

⁶ <http://www.okhistory.org/shpo/factsheets/fs14tax.pdf>.

⁷ <http://forum.savingplaces.org/HigherLogic/System/DownloadDocumentFile.ashx?DocumentFileKey=54e27df7-1135-ce87-4bc7-41ea6e55f70d&forceDialog=0>.

⁸ <http://www.okhistory.org/shpo/taxcredits.htm>.

STATE INCOME TAX CREDITS FOR COMMERCIAL PROPERTIES

Virginia's program has the advantage of a 10-year carry forward, and no cap that limits the number of properties that can use the state tax credit. Although more likely intended for commercial properties, the Virginia state tax credit program offers additional flexibility through "syndication" of the credit. This provision allows a taxpayer to acquire the state tax credit while a national corporation not doing business in the state acquires the federal tax credit.¹² Nonprofit organizations may also take advantage of the state tax credit under a limited partnership arrangement and maintaining minority ownership interest in a property.¹³

When Virginia initiated its state tax credit program in 1997, it was mostly projects for commercial properties that combined the state tax credit with the federal 20% historic preservation tax credits. That trend changed in the early 2000s, when both homeowner/owner occupants and developers began taking advantage of the state tax credit for non-income-producing property rehabilitation. This trend reversed again following the Great Recession of 2007-2009. Nevertheless, a 2014 study found that 43% of the properties redeveloped using the state historic preservation tax credit were single-family residences.¹⁴

Learn more at http://dhr.virginia.gov/tax_credits/tax_credit_faq.htm.



Residential property in Staunton, Virginia, rehabilitated using Virginia state historic preservation tax credits. Source: Miller & Associates, <http://www.robinmillerassociates.com/historic-tax-credit>.

12 Schwartz, 2016.

13 http://dhr.virginia.gov/tax_credits/tax_credit_faq.htm#B.

14 http://www.dhr.virginia.gov/pdf_files/VCU_Historic%20Tax%20Credit%20Report_FINAL_21-1-2014.pdf.

STATE BUSINESS INCOME TAX CREDITS

Missouri Neighborhood Assistance Program

The Missouri Neighborhood Assistance Program provides funding to community-based organizations to support neighborhood projects in the areas of community service, education, crime prevention, job training, and physical revitalization. This program is available statewide for nonprofit organizations with a 501(c)(3) IRS ruling. Many local Main Street programs have used this funding source to bolster their operating budgets, as has the state coordinating program Missouri Main Street Connection.



In 2012 the Council for Healthy Dent County received \$347,620 in NAP tax credits to renovate their community center, the Salem Freedom Activity Center.¹⁵

For any eligible business that makes a qualified contribution toward a Neighborhood Assistance Program (NAP) project, the Department of Economic Development (DED) will issue 50% or 70% state tax credits. Eligible businesses are varied and may include individuals who operate a sole proprietorship, operate a farm, have a rental property, have royalty income, are shareholders in an S-corporation, are partners in a Partnership, or are members of a Limited Liability Corporation.

The total amount of tax credits is capped at \$16 million per fiscal year. The awarded tax credit is also varied and can be applied to one of the following MO taxes paid by businesses:

- Income tax, excluding withholding tax
- Corporate franchise tax

¹⁵ http://www.thesalemnewsonline.com/news/local_news/article_fa35997a-17a2-11e2-a46a-001a4bcf6878.html

- Bank Tax
- Insurance Premium Tax
- Other Financial Institution Tax
- Express Companies Tax

Organizations may apply to receive a maximum of \$250,000 in 50% tax credits per project or \$350,000 in 70% tax credits per project, if the organization is in a qualifying rural area.

For more information on this program please visit the DED's Neighborhood Assistance Program webpage: <https://ded.mo.gov/programs/community/NAP>.

Washington State Main Street Tax Credit Program

Since 2006, Washington state has offered local Main Street programs an incentive called the Main Street Tax Credit Program. This incentive permits a business with either Business and Occupation (B&O) or Public Utility Tax (PUT) liability to obtain a tax credit for making a private contribution to a Washington Main Street Program Network Member. In addition, private contributions can be made to the Department of Archaeology and Historic Preservation's Main Street Trust Fund for downtown and neighborhood commercial district revitalization efforts. The Main Street Tax Credit program permits business owners to essentially self-direct their business taxes to a local Main Street program.¹⁶

After receiving approval from the WA Department of Revenue, a business may receive a tax credit for 75% of the value of a contribution made to an eligible downtown or neighborhood commercial district revitalization program, or 50% of the value of the contribution made to DAHP's Main Street Trust Fund.¹⁷ Businesses may take advantage of the tax credit up to \$250,000 per calendar year. An individual downtown and neighborhood commercial district can receive tax credit contributions up to \$100,000 per calendar year. All applications are submitted electronically.¹⁸

The tax credits for a business are not guaranteed, as the total statewide allocation is just \$1.5 million a year and the approvals are given annually on a first come first served basis, starting January 1. This is not considered a stable form of funding for local Main Street programs, as applications

¹⁶ <http://www.dahp.wa.gov/main-street-tax-credit-program>.

¹⁷ <http://www.dahp.wa.gov/main-street-tax-credit-program>.

¹⁸ http://www.dahp.wa.gov/sites/default/files/Applying%20for%20Credits-StepbyStep_1.pdf.

STATE BUSINESS INCOME TAX CREDITS

THE BASIC FACTS

- Eligible community organizations can receive donations totaling up to \$153,333.33 per calendar year.
- You need to be sure that your downtown organization is part of the state Main Street program. If you're not sure, please contact Washington's Main Street Program at 206.624.9449.
- Donating to the Main Street Trust Fund helps support revitalizing downtowns across the state! Building the capacity of the statewide program provides services to existing and future downtown organizations.



HOW IT WORKS

The Main Street Tax Credit Incentive Program provides a Business & Occupation (B&O) or Public Utility Tax (PUT) credit for private contributions given to eligible downtown organizations. Once your business's donation request is approved by the Department of Revenue, you are eligible for a tax credit worth 75% of the contribution to your downtown revitalization organization. Businesses statewide can also donate to the Main Street Trust Fund. In this case, the tax credit is worth 50% of your donation. In fact, a business can donate to both up to \$250,000. Additionally, if your downtown organization is a 501(c)(3) you may be eligible for a federal income tax deduction as a charitable contribution.



Local Main Street programs in Washington can participate in a tax credit program to fund their operations. Photo courtesy Washington Main Street Tax Credit Program. <http://www.dahp.wa.gov/sites/default/files/MSTCI%20Brochure.pdf>.

are made each year.¹⁹ The business cannot carry forward the credit, nor can the credit be refunded if the Business and Occupation or Public Utility Tax liability is not equal or greater than the credit approved for the year.²⁰ The contributions from the business can be spread out through the year.

The Washington Main Street Program administers the program and the Trust Fund, and expenditures from the account may be used only for the operation of the Washington Main Street Program.²¹ To learn more, visit <http://www.dahp.wa.gov/main-street-tax-credit-program>.

New Jersey Historic Trust State Corporate Income Tax Funds Preservation Grants

Since 1990, The New Jersey Historic Trust (NJHT) has distributed grant funds for preservation planning and brick and mortar construction throughout NJ to worthy preservation projects. Green Acres Bond issues from the state were the source of revenue for matching grants from 1990 until 2012. In November 2014, a state ballot referendum was passed by 65% of the voters to change the New Jersey Constitution to permit a portion of the state's

Corporate Business Tax to be used for a stable, annually dedicated revenue source of funds for open space, farmland, and historic preservation matching grants.

The corporate income tax revenue source is new, and continues the work of two bond funds: the Garden State Historic Preservation Trust fund, which operated from 2000-2012, and the Historic Preservation Bond Program, which operated from 1990-1997. Per the 2015 annual report, the NJHT has distributed more than \$137 million to 734 preservation projects across the state since 1990.²²

This switch from using occasional bond funds to using the state corporate income tax to fund open space, farmland, and historic preservation grants was viewed as providing a stable and predictable revenue source for these grants. The NJHT was a member of the Keep It Green Coalition, a coalition of more than 180 park and conservation organizations working to create a long-term, dedicated source of funding for the preservation and stewardship of New Jersey's natural areas, waterways, parks, farmland, and historic sites.²³

The historic preservation grants are five percent (5%) of the revenue pool, and are likely to generate between \$3 and \$4 million annually. This is a sharp cut to the historic preservation grant pool from previous bond fund grant

19 http://www.dahp.wa.gov/sites/default/files/Just%20the%20FAQs_1.pdf.

20 http://www.dahp.wa.gov/sites/default/files/Just%20the%20FAQs_1.pdf.

21 http://www.dahp.wa.gov/sites/default/files/Main%20StreetTax%20Credit%20Incentive%20Overview%20%20Legislation_2_e.pdf.

22 http://www.njht.org/dca/njht/resources/annual/2015_Annual_Report_forweb.pdf.

23 <https://www.nynjtc.org/news/governor-chris-christie-conditionally-vetoes-s969a780-preserve-new-jersey-act>.

STATE BUSINESS INCOME TAX CREDITS

rounds, where between \$5 to \$10 million were allocated to historic preservation grants. The NJHT estimates that eligible historic sites throughout the state need more than

“Per the 2015 annual report, the NJHT has distributed more than \$137 million to 734 preservation projects across the state since 1990.”

\$800 million in repairs over the next ten years for preservation and restoration projects. Planning grants under the Historic Site Management Projects can fund a wide variety of interpretation projects as well as planning for restoration of historic house museums. Several historic cemeteries have received planning funds in the past. Eligible properties must be listed on the State or National Register, or be a contributing building in a National Register historic district. The annual application process is highly competitive, and requests are often three times greater than the available amount of funding.

Learn more <http://njht.org/dca/njht/programs/>.

Philadelphia, PA Community Development Corporation Tax Credit Program

The City of Philadelphia uses the Community Development Corporation (CDC) Tax Credit Program to encourage and reward local businesses making a contribution and commitment to Philadelphia CDCs and their economic development efforts in distressed parts of the city.²⁴ The program is simple: In return for contributing \$100,000 per year to a CDC for ten years (with yearly renewals) a business or two businesses partnering for the total grant amount of \$100,000 receive a credit of \$100,000 per year against their Philadelphia Business Income and Receipts Tax obligation.

The local tax credit is available to a maximum of 42 businesses in any given tax year. Of the 42 available program slots, 40 are reserved for businesses that contribute to qualifying CDCs that undertake economic development activities and to nonprofit intermediaries. The remaining two slots are reserved for contributions to nonprofit organizations engaged in developing and implementing healthy food initiatives.²⁵

Due to the popularity of the program, the city advertises open slots when they become available. Once an opening has

24 <http://www.phila.gov/commerce/neighborhoods/Pages/CommunityDevelopment.aspx>.

25 <https://beta.phila.gov/services/payments-assistance-taxes/tax-credits/community-development-corporation-cdc-tax-credit/>.



The Tacony Community Development Corporation in Philadelphia uses the CDC Tax Credit to pay staff salaries and to match a portion of the merchant's contribution to the city's storefront grant program. Some completed storefront programs are shown here. Photos by Donna Ann Harris.

been announced, applications are reviewed and accepted. If there are more applicants than slots available on the deadline for submission, then a random drawing/lottery takes place by the Revenue Department to assign the tax credit slot.²⁶

A business is eligible to receive a tax credit of \$100,000 per year if it:

- Sponsors a qualifying organization that is not already participating in the tax credit program;
- Pledges to contribute \$100,000 per year to that qualifying organization for 10 consecutive years; and
- Applies for a renewal each year to establish continued eligibility.²⁷

A host of CDCs engaged in commercial corridor revitalization projects use the CDC tax credit to undergird their operating budget. The funds must be matched dollar for dollar, but can be used for any purpose including staff salaries, promotional activities, rent, etc. To learn more, visit

<https://beta.phila.gov/services/payments-assistance-taxes/tax-credits/community-development-corporation-cdc-tax-credit/>.

26 <https://business.phila.gov/cdc-tax-credit-lottery-application-is-due-january-12-2017/>.

27 <https://beta.phila.gov/services/payments-assistance-taxes/tax-credits/community-development-corporation-cdc-tax-credit/>.

STATE SPECIAL TAXING DISTRICTS



Beekman Bank and other wooden buildings on West California Street in downtown Jacksonville, OR. Historic Jacksonville, Inc., which operates tours of Beekman Bank, was part of the proposed Rogue Valley Heritage District which was defeated in a November 2016 ballot. Photo by Joe Mabel, via Wikimedia.

Oregon Heritage Districts

Oregon law allows for the creation of “heritage districts,” which support local historical societies and museums and are funded by an annual tax for all residents of the district. To be approved, a district, which may stretch across multiple counties, must elect a board and be discussed at a public hearing (in each county, if applicable). The heritage district board must be composed of five members, elected by electors of the district by either election at large or by zone. The board must include a representative of the museums. Any elector residing within the district is qualified to serve as a board member.²⁸

Among other things, the enabling legislation authorizes the heritage board to assess, levy, and collect taxes to pay the costs of:

- Acquiring, constructing, reconstructing, altering, operating and maintaining heritage sites and structures
- Accepting gifts/donations or purchasing to preserve historical objects, real and personal property of historical interest, and records, artifacts, photographs, documents, material, and data of historical importance
- Establishing and maintaining programs for heritage societies within the district
- General operating expenses of the district

The board must determine and fix the amount of money to be levied and raised by taxation each year. The total amount may not exceed .00025% of the real market value of all taxable property within the district. When authorized by the electors, the board may also issue general obligation bonds, the aggregate amount of issues and outstanding which may not

exceed 2.5% of the real market value of all taxable property of the district. The board may establish a sinking fund to defray the costs of acquiring and restoring historic properties. The sinking fund may be created through the inclusion annually within the tax budget of the district of items representing the yearly installments to be credited to the fund. The legislation notes that the heritage district boundaries may need to be adjusted periodically by the board to make them as nearly equal in population as the latest federal census.

This program does not appear to have been utilized often. Oregon’s Jackson County Board of Commissioners placed a proposal for a heritage district on the November 2016 ballot, which was defeated by a two-thirds margin.²⁹ The Rogue Valley Heritage District would have provided permanent funding to the Southern Oregon Historical Society and around 15 other historical societies and museums scattered throughout Jackson County.³⁰ **The heritage district would have cost five cents per \$1,000 of assessed property value, or \$10 per year for a home assessed at \$200,000. The proposed heritage district, had it passed, would have generated about \$800,000 to \$850,000.**

28 <https://www.oregonlaws.org/ors/2013/358.444>.

29 <http://www.mailtribune.com/news/20161109/jackson-county-city-measure-results>.

30 <http://www.mailtribune.com/news/20160524/jackson-county-to-put-heritage-district-measure-on-november-ballot>.

PROPERTY TAX FREEZES/LOCAL PROPERTY TAX SURCHARGE

Massachusetts Community Preservation Act

Massachusetts Community Preservation Act (CPA) was designed to help communities preserve open space and historic sites, create affordable housing, and develop outdoor recreational facilities. Since the law was passed in 2000, the CPA has strengthened the state and local workforce by supporting the tourism industry through preservation of historic and natural resources.³¹

Cities and towns that adopt CPA obtain community preservation funds from two sources - a local property tax surcharge and a yearly distribution from the statewide CPA Trust Fund.³²

The local property tax surcharge cannot be more than three percent (3%) of the tax levy against real estate property and is adopted by a municipality through a ballot referendum. Trust fund revenues are derived from a surcharge placed on all real estate transactions at the state's Registries of Deeds.³³ The surcharge for most documents filed at the Deed Registries is \$20, which is immediately deposited the CPA Trust Fund held at the Department of Revenue (DOR). Municipal lien certificates are subject to a \$10 surcharge. Depending upon the state of the real estate market, the \$20/\$10 fees add up to anywhere between \$24 million and \$53 million per year.³⁴

The local property tax surcharge is described this way on the Community Preservation Coalition web site: A home is assessed at \$380,000. After subtracting the first \$100,000 in residential property value (assuming the community has adopted this optional and very popular CPA exemption), the homeowner's net value to be surcharged equals \$280,000. After applying this sample municipality's tax rate of \$11.47 per \$1,000, the amount subject to the CPA surcharge would be about \$3,200. With a 1.5% CPA surcharge applied, the CPA surcharge for this homeowner would be approximately \$45 per year. This \$45 would be transferred to the neighborhood's Community Preservation fund by the City or Town Accountant or Tax Collector.

The other source of funds comes from the statewide CPA Trust Fund, though the receipt of the annual matching of funds at variable rates from a statewide CPA Trust Fund was created by the Act. Only communities that have adopted CPA are eligible to receive these matching funds each year. In March of each year, every CPA community receives

31 <http://www.communitypreservation.org/content/cpa-overview>.

32 <http://www.communitypreservation.org/content/trustfund>.

33 <http://www.communitypreservation.org/content/trustfund>.

34 <http://www.communitypreservation.org/content/trustfund>.



In 2015, a unique Island-Wide CPA collaboration preserved The Gay Head Lighthouse, saving the 160 year old relic.³⁵ (photo:<http://www.communitypreservation.org/successstories/historic-preservation/9242>).

their distribution from the trust fund at a formula-based percentage of what they raised locally. Historic burial ground restoration projects have been funded with CPA monies.³⁶

The local Community Preservation Committee reviews grant applications, or issues bonds or leverages CPA funds for larger projects.³⁷ As of November 2016, 172 municipalities in the state have adopted CPA.

Community Preservation Act Accomplishments To-Date:³⁸

- **49% of the Commonwealth's cities and towns have adopted CPA**
- **Nearly 60% of the state population live in a CPA community**
- **Just over \$1.75 billion has been raised for community preservation funding statewide**
- **Over 9,000 projects have been approved by local legislative bodies**
- **Over 4,200 affordable housing units have been built**
- **26,297 acres of open space have been preserved**
- **Over 4,400 appropriations have been made for historic preservation projects**
- **Over 1,700 outdoor recreation projects have been initiated³⁹**

For more information on the Massachusetts

35 <http://www.communitypreservation.org/successstories/historic-preservation/9242>.

36 <http://www.preservationmass.org/burial-grounds>.

37 <http://www.bostonpreservation.org/advocacy/community-preservation-act.html>.

38 <http://www.communitypreservation.org/content/cpa-overview>.

39 <http://www.communitypreservation.org/content/cpa-overview>.

PROPERTY TAX FREEZES/LOCAL PROPERTY TAX SURCHARGE



Frank Lloyd Wright designed the Mary Adams House in Highland Park, which used the Property Tax Freeze Program in Illinois. Photo Landmarks Illinois.

Community Preservation Act, please visit: <http://www.communitypreservation.org/content/cpa-overview>.

Illinois Residential Property Tax Freeze

The Illinois Property Tax Assessment Freeze Program freezes the assessed value of a historic, owner-occupied, principal residence for eight years while the owner undertakes a substantial, approved rehabilitation project. The assessed value is returned to market level over a period of four years. The program is administered by the Illinois Historic Preservation Agency (IHPA), and is free to Illinois homeowners.

To qualify for the program, a property must be a certified historic structure by being listed on the National Register of Historic Places individually or in a district, or by local landmark designation in a community with an approved historic-preservation ordinance. It can be a single-family, owner-occupied, principal residence, a condominium building, a cooperative building, or a residential building with up to six units if the building owner resides in a unit. Eligible structures are undergoing rehabilitation with a budget that exceeds 25% of the property's assessor's fair market value within a 24-month period. The rehabilitation process must meet *The Secretary of the Interior's Standards for Rehabilitation*.

The application consists of Parts 1 and 2, which must be submitted prior to beginning any work. If the scope of work changes during construction, the owner must consult the agency to ensure the work continues to meet the *Standards*. Applications must be submitted within two years of a project's completion.⁴⁰

40 <https://www2.illinois.gov/ihpa/Preserve/Pages/freezefaq.aspx>.

The exterior front and usually the sides including their historic windows must be retained. We encourage adding weather-stripping and storm windows. The house's main rooms (i.e., living and dining rooms, vestibule, stairs, halls) and their important elements (i.e., wood floors, mantels, tile surrounds, hearths, built-in cabinets, doors, trim and casings, and decorative ceilings and coves) must be retained. Most kitchens, baths, attics, basements, and back bedrooms can be changed as the owner desires.

An interesting component is that "do it yourself" labor can qualify for the rehab budget. Applicants must submit a "Do-It-Yourself Labor Report" with Part 3. The allowable rate is the Illinois state minimum wage (\$8.25/hour). Professionals can charge their own rate for work done in their professions. For example, plumbers can claim their professional rate for plumbing work on their house but can only count minimum wage for plastering or roofing. A letter certifying your professional rate must accompany the form.

Learn more at <https://www2.illinois.gov/ihpa/Preserve/Documents/summary-taxfreeze.pdf>.

Cook County IL, Class L Property Tax Incentive

Like many states and municipalities, Cook County, IL, which includes the city of Chicago, offers landmark commercial, industrial, types of not-for-profits, and multi-family residential buildings the opportunity to reduce their property tax assessments for 12 years.⁴¹ Homeowners are not permitted to use this incentive. Called the Class L (for landmarks) incentive, it is not a tax-freeze program.

41 https://www.cityofchicago.org/city/en/depts/dcd/provdrs/hist/svcs/class_l_propertytaxincentive.html.

PROPERTY TAX FREEZES/LOCAL PROPERTY TAX SURCHARGE



The iconic Wrigley Building in Chicago has taken advantage of the Class L property tax incentive. (Photo: https://en.wikipedia.org/wiki/Wrigley_Building) CC BY-SA 3.0, <https://commons.wikimedia.org/w/index.php?curid=781572>.

The property continues to be reassessed, but at the lower assessment levels.⁴² Municipalities and other taxing entities (school districts, park districts, etc.) must opt into the program by resolution. Not every municipality or taxing district in Cook County has done so.⁴³

Eligible properties have been individually designated as a landmark, or as contributing buildings in a designated historic or landmark district.⁴⁴ If the building is in Chicago, the building must be an individually-designated city of Chicago landmark or a contributing building in a city of Chicago landmark district. The Commission on Chicago Landmarks must certify that the rehabilitation meets The Secretary of the Interior's Standards for Rehabilitation of Historic Buildings, and the Chicago City Council must support granting the

incentive by resolution.⁴⁵

The property tax assessment is reduced for a 12-year period, if owners have invested at least half of the assessor's full market value of the landmark building in an approved rehabilitation project. In Cook County, commercial and industrial buildings are typically assessed at 25% of their fair market value. Buildings using the Class L incentive are reduced to 10% of the assessed value for the first ten years, then 15% in the eleventh year, 20% in the twelfth year, and then back to the regular assessment rate in year thirteen. The land portion of the assessment is also eligible for the incentive if the building has been vacant or unused continuously for the two years prior to the rehabilitation.

The city of Chicago's Class L application form is quite complicated and requires submission of proformas, internal rate of return and tax analysis, an economic disclosure statement and affidavit, and proof of compliance with the Department of Zoning and Land Use Planning Sustainable Development Policy Matrix.

See information for the city of Chicago application form at: https://www.cityofchicago.org/content/dam/city/depts/zlup/Historic_Preservation/Publications/Class_L_Application_Document_2014.pdf

⁴² https://www.cityofchicago.org/content/dam/city/depts/zlup/Historic_Preservation/Publications/Class_L_Application_Document_2014.pdf.

⁴³ <http://www.landmarks.org/resources/preservation-news/property-tax-assessment-freeze-program-now-available-historic-homes-district-113/>.

⁴⁴ <http://www.cookcountyassessor.com/assets/forms/clsla.pdf>.

⁴⁵ https://www.cityofchicago.org/content/dam/city/depts/zlup/Historic_Preservation/Publications/Class_L_Application_Document_2014.pdf.

Colorado State Historical Fund

The Colorado State Historical Fund is supported by gambling revenue. Gambling was legalized in Central City, Cripple Creek, and Black Hawk in 1990 and a portion of gambling revenues from these locations is used for historic preservation grants. Since 1990, more than 4,200 historic preservation projects in every county of Colorado have been funded with gaming money. Since its establishment, the fund has awarded \$273,421,244 in grants.⁴⁶ The grant program has helped to create jobs, restore structures for reuse as businesses and affordable housing, and boost tourism all while preserving Colorado's history for future generations. State Historical Fund grants are administered by History Colorado, an agency of the State of Colorado under the Department of Higher Education.⁴⁷

“Since its establishment, the fund has awarded \$273,421,244 in grants.”

The State Historical Fund is bolstered by 28% of the total tax revenue created by gambling. The gaming towns themselves receive 20% of the 28%, which they put towards their own historic preservation efforts. The State Historical Fund receives the other 80%. The State Historical

Fund assists in a wide variety of preservation projects including restoration and rehabilitation of historic buildings, architectural assessments, archeological excavations, designation and interpretation of historic places. Preservation planning studies and education and training programs.⁴⁸

Grant amounts are based on project needs. The largest grant, which amounted to \$625,000, was issued to the Colorado Springs Housing Authority for their adaptive use of the Lowell School into their office space. Most grants are less than \$200,000.⁴⁹

The grant application is online at http://www.historycolorado.org/sites/default/files/files/OAHP/crforms_edumat/pdfs/1412a.pdf.



The Colorado Springs Housing Authority received a \$625,000 grant from the Colorado State Historical Fund, supported by gambling proceeds, to rehabilitate the historically-designated Lowell School into their office space. (Photo: http://www.quantumcommercial.com/historic-lowell-school-listing_detail-394.aspx).

46 <http://www.historycolorado.org/oahp/state-historical-fund>.

47 <http://www.historycolorado.org/about-us/about-us>.

48 <http://www.historycolorado.org/oahp/state-historical-fund>.

49 <http://coloradogambler.com/historic-preservation-gaming-revenue-supports-multimillion-dollar-historic-preservation-efforts/>.

Minnesota Historical Society Historical and Cultural Grants

The Minnesota Historical Society is one of the great Midwestern history organizations that has both a public and private sector focus to bring history to life for all Minnesotans. Their mission is simple: Using the Power of History to Transform Lives.⁵⁰ The organization houses the Minnesota History Center with their famed library, well known to genealogists, the center's collections, and the Minnesota SHPO. It manages 26 historic sites and museums and offers educational programs for adults and school children across the state. The Minnesota Historical Society Press is the oldest publisher in the state and the largest historical society press in the nation. Finally, the MHS funds exhibits and programs.⁵¹

When Minnesota voters passed the Clean Water, Land and Legacy Amendment, the state legislature created the Arts and Cultural Heritage Fund (H.F. 1231), a portion of which was appropriated to the Minnesota Historical Society for history-related projects around the state.

Minnesota Historical and Cultural Heritage Grants support a wide range of projects in history collections care and management, reproduction, interpretive programs and public education, museum and archives environments, oral history, research and writing, and publications.⁵²

Historic Preservation grants can fund heritage tourism, historic properties, National Register nominations, local designation, preservation planning, survey, inventory and evaluation.⁵³

Finally, there are structured grants which deal with specific activities or projects at sites and historical societies/archives. The structured option for small grants (\$10,000 or less) provides a simplified, short form application for projects tailored to common needs of historical organizations. These needs can include acquiring primary resources on microfilm, purchasing and maintaining microfilm readers, printers, and scanners, developing a disaster plan, and the evaluation of building mechanical systems (HVAC). These grants can also fund general conservation assessments, long range preservation plans, Minnesota Encyclopedia entries, funds to pay for Minnesota history, historic preservation, museum bookshelves, fees for the American Association for State and Local History's StEPs Assessment program, and planning for

the redesign of museum lighting. In addition, grants can be used towards National Register property evaluations and the scholarships to professional meetings.

For the FY 2016-2017 biennium beginning on July 1, 2015, \$11.5 million is available: \$5,525,000 for FY 2016 and \$6,000,000 for FY 2017. Grants over \$10,000 have a preapplication process. Eligible applicants include nonprofit 501(c)(3) organizations, governmental units, tribes, and educational institutions. Partnership projects and collaborations are encouraged.

Awarded projects generally can commence eight weeks after small grant application deadlines and approximately 12 weeks after final application deadlines for large proposals. Commencement is contingent upon grantee response to contracts.

Learn more: <http://legacy.mnhs.org/grants>.

“For the FY 2016-2017 biennium beginning on July 1, 2015, \$11.5 million is available: \$5,525,000 for FY 2016 and \$6,000,000 for FY 2017.”

50 <http://www.mnhs.org/about/mission>.

51 <http://www.mnhs.org/about>.

52 <http://legacy.mnhs.org/grants>.

53 <http://legacy.mnhs.org/grants>.

Landmarks Illinois Preservation Heritage Fund Grant Program

Landmarks Illinois is a statewide nonprofit preservation organization, and they offer a Preservation Heritage Fund Grant Program that provides matching grants ranging from \$500-\$2,500 to fund preservation efforts for historically, culturally, or architecturally significant structures in the state. Established in 2004, the fund is allocated from Landmarks Illinois' budget annually and offers financial aid to significant sites in Illinois that are in danger of being demolished, are deteriorating, need to be structurally stabilized, or have re-use potential.⁵⁴ Grants can also be used to fund studies that determine whether sites should be designated as landmarks. Priority consideration is given to structures that are on the most recent "Eleven Endangered Properties in Illinois," released annually by Landmarks Illinois, as well as the "Chicago Watchlist," released by local preservation organization Preservation Chicago.

Applicants must be a nonprofit or governmental organization that owns the structure in question. Exceptions are made if the only way to preserve the eligible structure is through issuing the grant, and if the public good achieved by preserving the site is greater than the benefits to the applicant. The grant must be used for projects that are related to the preservation efforts of an eligible structure, not for expenses related to regular maintenance or ownership.⁵⁵

The application for the Preservation Heritage Fund Grant requests elaboration on the significance of the structure and an action plan, as well long-term preservation plans. To review the application, visit http://www.landmarks.org/wp-content/uploads/2016/08/1__APPLICATION_Heritage_Fund.pdf.



Second Presbyterian Church in Chicago was a recipient of the Landmarks Illinois Preservation Heritage Fund Grant. (<http://www.2ndpresbyterianfriends.org/preservation/previous-projects>) (photo by Martin Cheung, <http://www.chicagoarchitecture.org/2013/06/13/the-south-loops-revival-brings-new-appreciation-for-chicagos-landmark-second-presbyterian-church/second-exterior-modern/>).

54 <http://www.landmarks.org/resources/financial-resources/landmarks-illinois-grants-landmarks-illinois/>.

55 http://www.landmarks.org/wp-content/uploads/2016/08/2_GUIDELINES_Heritage_Fund.pdf.

Maryland Heritage Area Authority Loan Program

Maryland Heritage Areas are places that connect people, water, and land to exemplify a unique aspect of Maryland's history. Thirteen sites, comprised of stretches of land and buildings in the state, are designated as Heritage Areas. They range in size from a small part of a county to an entire regional area and include Baltimore National Heritage Area, Heart of the Civil War Heritage Area, and Stories of the Chesapeake Heritage Area, among others.⁵⁶

The Maryland Heritage Areas Authority is operated by the Maryland Historical Trust, which acts as the SHPO, and oversees the Maryland Heritage Areas Loan Program. The authority offers loans to nonprofit organizations, local jurisdictions, individuals, and business located within heritage areas.⁵⁷ Projects within a Maryland Heritage Area that further preserve the area's history, enhance heritage attractions, or support visitor services are considered eligible.⁵⁸



Maryland Heritage Areas connect people, water, and land to tell a unique story about Maryland's history. (<https://mht.maryland.gov/heritageareas.shtml>).

Loans are issued on a first come, first served basis for all projects. Their interest rates vary. Principal amounts are at the discretion of the Maryland Heritage Areas Authority. Repayment occurs on a monthly plan and may be deferred with permission.⁵⁹ Maryland Heritage Areas can use the loans for a wide variety of purposes:

- To acquire additional property, rehabilitate and restore structures within their heritage area
- Conduct leasehold improvements
- Purchase equipment, inventory, or furnishings to enhance sites.⁶⁰

The guidelines for the Maryland Heritage Areas Loan Program can be found at <http://mht.maryland.gov/documents/PDF/grants/MHAA%2014.29.04-Loans.pdf>.

Maryland Historic Preservation Loan Program for Capital Projects

The Maryland Historical Trust (MHT) Capital Loan Program was created to encourage the preservation of historic properties by providing a source of funding. Loans are offered to local jurisdictions, nonprofit organizations, business entities, and individuals that assist and encourage efforts to acquire and preserve historic properties⁶¹. Eligible projects that are covered by the loans may include acquisitions, refinancing, rehabilitation, and predevelopment costs (i.e. studies, surveys, plans, and specifications).

Properties must be listed, or eligible for listing, on the National Register for Historic Places. A perpetual preservation easement on the assisted property must also be provided to MHT. Additionally, religious purpose buildings, or places of worship, are generally eligible for assistance for exterior work only. However, spaces used primarily for religious purposes or elements bearing religious imagery are not eligible for funding.⁶²

The amount, interest, and term of the loans provided can vary based off several factors. A short overview is listed below. For more detailed information, please visit: <http://mht.maryland.gov/loans.shtml>.

- The principal amount of the loan is limited by the available uncommitted balance in the loan fund at the time of application and the borrower's ability to repay the loan.
- For acquisition projects, the loan amount cannot exceed 80% of the appraised value of the assisted property or 90% of the purchase price, whichever is less.
- For rehabilitation projects, the loan amount typically cannot exceed 80% of the after rehabilitation appraised value of the assisted property (minus existing mortgage balances) or 100% of the project

⁵⁶ <http://mht.maryland.gov/heritageareas.shtml>.

⁵⁷ <https://mht.maryland.gov/heritageareas.shtml>.

⁵⁸ <http://mht.maryland.gov/documents/PDF/grants/MHAA%2014.29.04-Loans.pdf>.

⁵⁹ <http://mht.maryland.gov/documents/PDF/grants/MHAA%2014.29.04-Loans.pdf>.

⁶⁰ http://mht.maryland.gov/heritageareas_partners.shtml.

⁶¹ <http://mht.maryland.gov/loans.shtml>.

⁶² http://mht.maryland.gov/documents/PDF/grants/MHT%20Capital%20Loans_Guidelines_2-17-17.pdf.

LOAN FUNDS

costs, whichever is less.

- For refinancing projects, the loan typically cannot exceed 80% of the appraised value of the assisted property.
- The maximum loan principal amount for ANY proposed project is the after-rehabilitation value of the historic property to be assisted, less the outstanding amount of any pre-existing indebtedness secured by the historic property.
- The loan term is defined by project type.
- Loans to non-profit organizations and political subdivisions may bear interest, if any, at a rate not to exceed that for business entities or individuals.

Complete information on the MHT loan application, guidelines, and regulations can be found at <http://mht.maryland.gov/loans.shtml>.

The screenshot shows the website for the Maryland Historical Trust, part of the Department of Planning. The page is titled "Historic Preservation Loan Program for Capital Projects". It includes a search bar, navigation links (HOME, FUNDING, RESEARCH AND SURVEY, PROJECT REVIEW, ARCHEOLOGY, GET INVOLVED), and social media icons. The main content area is divided into three sections: "Resources" with links to Application Instructions, Guidelines, Proposed Loan Program Regulations, Manual of Program Requirements, and Financial Reporting Requirements; "Forms" with a link to Loan Application; and "Eligible Applicants" which lists Nonprofits, Local governments, and Business entities. A note states that individuals are often not competitive unless they are of exceptional historical significance. A footer note mentions that business entities and individuals must demonstrate that private-sector financing for the project could not be obtained.

Screenshot of the Capital Projects Loan Program section of the Maryland Historic Trust website. <http://mht.maryland.gov/loans.shtml>.

ENDOWMENTS

New Jersey Cultural Trust Matching Endowment Funds for History Organizations

The New Jersey Cultural Trust was established in July 2000 in order to create a permanent, interest-generating fund to be an additional source of revenue to nonprofit arts, history, and humanities organizations, specifically for the building of endowments, the improvement of institutional and financial stability, and the capital improvement of cultural facilities.⁶³ The NJCT is a public-private initiative that has been trying to develop through equal contributions from state and outside sources at least \$200,000,000 that can be invested either in the Fund or the endowments of qualified organizations. However, to date, the state has contributed \$29,021,000 toward the purposes of the Trust.⁶⁴

The Cultural Trust encourages large gift donations to endowments of qualified groups, such as history organizations or house museums. When a qualified organization receives, and certifies a single endowment gift of over \$100,000, the gift is matched, subject to available appropriation, with state dollars into the Fund. Twenty percent (20%) of the state's match then goes to that organization. The other eighty percent (80%) is kept in the Cultural Trust Fund. This is a powerful way for cultural groups to encourage the private sector to make larger gifts. As of October 2013, the principal in the Fund itself reached just over \$20 million and earned over \$4 million in interest. Certified donations to endowments of qualified organizations plus 20% large gift matching dollars from the Fund exceed \$43 million.

“As of October 2013, the principal in the Fund itself reached just over \$20 million and earned over \$4 million in interest.”

To qualify for endowment matching through the New Jersey Cultural Trust, an organization must be a private, nonprofit, tax-exempt, arts, humanities, or history organization, incorporated in New Jersey and operating for at least four years. Funding is awarded based on the recommendations from the New Jersey Council on the Arts, the New Jersey Historical Commission, and the New Jersey Historic Trust.⁶⁵ Private donors have the option to make a “restricted donation” directly to qualified organizations for endowment, which are

matched by the Cultural Trust once certified.⁶⁶ The NJCT seeks every endowment contribution certified. They build the Cultural Trust Fund faster, bolster interest earnings, and increase its grant making impact.⁶⁷

For more information on New Jersey Cultural Trust funding please visit http://nj.gov/state/culturaltrust/dos_ct_information.html.

...and protect and nurture the state's cultural legacy for generations to come.

WHAT IS THE PURPOSE OF THE CULTURAL TRUST FUND?

The New Jersey Cultural Trust Fund is a permanent investment fund whose earnings will be given in grants to support three specific purposes:

- Build the endowments of nonprofit arts, history and humanities organizations
- Finance important capital projects, and
- Improve the organizational and financial management of cultural organizations.

ARE GRANTS BEING AWARDED?

Yes, with the FY 2016 grant awards, the Cultural Trust has distributed nearly \$6.9 million to qualified organizations throughout the State for financial stabilization and historic preservation projects. (See a listing of grant recipients under "Grants Awarded" in this website.)

HOW CAN CULTURAL ORGANIZATIONS APPLY FOR GRANTS?

Organizations must first be designated "qualified" in order to be eligible to participate in the programs of the Trust.

Any private, nonprofit, tax-exempt, arts, humanities, or history organization that is incorporated in New Jersey and has been operating for at least 4 years, and has appropriate financial records is eligible to be designated a "qualified" organization. Applications are accepted several times each year and forms may be obtained from the office by calling 609-984-6767 or from this website - see Programs Section

As called for in the Cultural Trust Act, grants are made based on the recommendations from the New Jersey Council on the Arts, the New Jersey Historical Commission and the New Jersey Historic Trust.

The recommending agencies establish criteria and guidelines for the grants programs, manage the process and make recommendations annually to the Cultural Trust. Sample applications are available on this website - see programs Section.

Qualified organizations will be notified when new grant programs are announced.

BUILDING THE FUND, HOW DOES IT WORK, WHAT IS THE FINANCIAL GOAL?

The Cultural Trust is a public-private initiative that seeks over ten years to develop through equal contributions from state and outside sources at least \$200,000,000 that can be invested either in the Fund or the endowments of qualified organizations.

HOW DO DONORS GIVE TO THE TRUST?

Website of the New Jersey Cultural Trust describing endowment matching program. http://www.nj.gov/state/culturaltrust/dos_ct_information.html.

63 <http://nj.gov/state/culturaltrust/pdf/rules.pdf>.
64 http://nj.gov/state/culturaltrust/dos_ct_information.html.
65 http://nj.gov/state/culturaltrust/dos_ct_information.html.

66 <http://nj.gov/state/culturaltrust/pdf/rules.pdf>.
67 http://nj.gov/state/culturaltrust/dos_ct_information.html.

OTHER INCENTIVES OR FUNDING FOR HERITAGE PROJECTS



DOUBLE YOUR DONATION FOR FREE!

DONATE
TO A QUALIFIED
OREGON
NONPROFIT

+

DONATE
THE SAME
AMOUNT TO
THE TRUST

=

DEDUCT
THAT AMOUNT
FROM YOUR
STATE TAXES!

If an individual donates to a qualified Oregon nonprofit and donates the same amount to the Oregon Cultural Trust, they qualify for a state income tax credit. 40% of funds raised goes back to the permanent fund for growth and the remaining funds are distributed through grants. Learn more by visiting the FAQ page: <http://culturaltrust.org/resources/faq/>.

Oregon Cultural Trust Matching Grant Programs

Created in 2002 by the Oregon Legislature, the Oregon Cultural Trust is funded through donations made by members of the public in exchange for a 100% state income tax credit for their charitable giving to the Trust. Individuals may take the OR state tax credit up to \$500, couples up to \$1,000, and C corporations (but not S corporations) up to \$2,500 for contributions to the Trust. The Trust raises more than \$4.5 million annually, 40% of which goes back into the permanent fund to foster continued growth. The remaining 60% raised, plus investment income from the permanent fund, is distributed through three annual grant programs-- Cultural Development grants, Cultural Coalition grants, and Cultural Partner grants.



The National Society of the Colonial Dames in Oregon was awarded a \$40,000 grant to support the structural stabilization of the Hoover-Minthorn House Museum in Newberg, Oregon in 2016. Photo source: <http://www.hooverminthorn.org/>.

In fiscal year 2016-17, the Cultural Trust will award 149 grants totaling \$2.9 million to cultural nonprofits.⁶⁸ Every Trust donor gives first to any of Oregon’s 1,400 participating

68 <http://culturaltrust.org/blog/news/cultural-trust-awards-2-9-million-to-oregon-cultural-organizations/>.

cultural nonprofits, then matches that gift with a contribution to the Trust.⁶⁹ There are 326 organizations on the Heritage Nonprofits list, including some Main Street programs.

Cultural Development grants are awarded in four categories and are intended to fund arts, heritage, history, preservation, and humanities projects. Applying organizations must be registered as a “Cultural Nonprofit” with the Cultural Trust. To do so, an organization must provide services in Oregon and either be a registered 501(c)(3), a cultural entity within a federally recognized Indian Tribe based in Oregon, or an institution of higher learning. Grants generally range from \$5,000 to \$40,000 with a maximum request amount of \$50,000, and a one to one match is required.⁷⁰

Cultural Coalition grants fund Oregon’s 45 county and tribal Cultural Coalitions, which in turn distribute grant dollars through their own grant programs to address community needs and priorities. These programs fund a broad range of cultural work that includes arts education, local history preservation projects, community theater, and library programs for toddlers and elders.⁷¹

The Cultural Trust works directly with five Statewide Partners who receive a percentage of the funds distributed by the Trust each year to support the programs and services they provide across the state. These partners are the Oregon Arts Commission, Oregon Humanities, Oregon Heritage Commission, the State Historic Preservation Office, and the Oregon Historical Society.⁷²

To learn more, go to: <http://culturaltrust.org/>.

69 <http://culturaltrust.org/grants/what-we-fund/>.

70 http://culturaltrust.org/wp-content/uploads/CDV_FY18_GuidelinesBudgetForms_20170119.pdf.

71 <http://culturaltrust.org/about-us/coalitions/>.

72 <http://culturaltrust.org/about-us/statewide-partners/>.

OTHER INCENTIVES OR FUNDING FOR HERITAGE PROJECTS

Bergen County, NJ County Bonds for Open Space and Historic Preservation

Established in 1998, Bergen County, New Jersey's Trust Fund program supports open space, recreation, floodplain protection, farmland and historic preservation projects. Bergen County's Trust Fund is one of 19 (of 21) counties in New Jersey that have used bond funds to pay for open space, farmland, and historic preservation purposes.⁷³ Located in Northern New Jersey, Bergen County is a wealthy suburban community where many people commute to NYC for work.



The 11-year restoration and reuse of the 1891 Darlington Schoolhouse in Mahwah, NJ was supported with funds from the Bergen County Open Space and Historic Preservation Trust Fund. Photo source: NorthJersey.com More information: <https://www.nynjtc.org/content/darlington-schoolhouse>.

The Trust Fund is supported through a property tax assessment determined annually by the governing board of the county, at a rate not to exceed .01% of the total county equalized real property valuation.⁷⁴ The Trust Fund is divided into two separate programs: The County Program, which receives 70% of the money, and the Municipal Park Improvement Program, which receives the remaining 30%. Historic preservation funding falls under the County Program. Trust Fund dollars are used countywide to preserve land, maximize recreational opportunities, acquire flood-prone properties, and preserve farmland and historic buildings.

Bergen County Trust Fund matching grants are available to fund many things including the acquisition, stabilization,

⁷³ <http://www.anjec.org/pdfs/PublicFinancingOpenSpace.pdf>.

⁷⁴ <http://www.co.bergen.nj.us/index.aspx?NID=203>.

rehabilitation, restoration, and preservation of historic sites and house museums as well as the preparation of plans and reports associated with the implementation of historic preservation capital projects by the county, municipalities, and qualified non-profit organizations.

Each year, potential applicants file an Intent to Apply form.⁷⁵ Funding is only available for properties listed on or eligible for the New Jersey or National Register of Historic Places either individually or as a contributing part of a historic district. Other requirements include a cash match of 50% for organizations with an annual budget of \$100,000 or more, or a 25% match for organizations with a budget of less than \$100,000. All grant projects must offer public access. For properties that receive an acquisition grant, the grant recipient/owners must execute a permanent historic preservation easement. All professionals, contractors, and craftspeople that are to perform work funded by the grant must be approved by the program, and all funded projects must be reviewed by the New Jersey Historic Preservation Office (SHPO) to ensure compliance with *The Secretary of the Interior's Standards*.⁷⁶

Learn more at <http://www.co.bergen.nj.us/index.aspx?NID=205>.

Snohomish County, WA Community Heritage Grant Program

The Historic Preservation Commission of Washington's Snohomish County operates a grant program to bolster the county's heritage. The Community Heritage Program offers matching grants to public and non-profit organizations to support Snohomish County's historic preservation projects. The matching grants can be issued in amounts up to \$10,000.⁷⁷ The grant program is funded with an allocated amount of the document recording fees collected by the Snohomish County Auditor. According to legislation, a portion of these fees are to be used for projects that promote historic preservation and programming.⁷⁸

Snohomish County's Historic Preservation Commission awards the matching grants to projects that increase public access to county history. They may be used for a variety of purposes including structural improvements, staff development, public education, and curatorial needs such as the acquisition and conservation of material culture.⁷⁹ Grants

⁷⁵ <http://www.co.bergen.nj.us/index.aspx?NID=205>.

⁷⁶ <http://www.co.bergen.nj.us/DocumentCenter/View/3190>.

⁷⁷ <http://www.preservewa.org/News178.aspx>.

⁷⁸ <https://app.leg.wa.gov/rcw/default.aspx?cite=36.22.170>.

⁷⁹ <http://snohomishcountywa.gov/147/Historic-Preservation-Commission>.

OTHER INCENTIVES OR FUNDING FOR HERITAGE PROJECTS

may also fund productions and distribution costs for books, oral histories, and documentaries, that shed light on county history.⁸⁰ The application and guidelines for Community Heritage Grants can be found at <http://www.preservewa.org/News178.aspx>.

Maryland Traditions Project Grants

Maryland Traditions Project Grants support research and programming that adds significance to Maryland communities by encouraging and funding professionals as well as community scholars, organizations, and artists to document, preserve, sustain, and present Maryland's traditional arts and culture.⁸¹

Maryland Traditions Project Grants support nonprofit, tax exempt organizations in their arts programming and projects. Grants are awarded by the Maryland State Arts Council, which is a Maryland state agency run by the Department of Commerce. The awarded amount ranges from \$1,000-\$5,000. These grants are funded with monies from the State of Maryland, the National Endowment for



Dia de los Muertos Traditions, produced by Creative Alliance and Artesanas Mexicanas, received an award of \$5,000 from the Maryland Tradition Project Grants for 2017. The program honors Day of the Dead beliefs and its folkloric art forms. (<http://www.creativealliance.org/events/2016/community-altars-dia-de-los-muertos>).

the Arts, and private sponsors.⁸² All grant applications are completed online.

Maryland Traditions was established in 2001 as the statewide folklife infrastructure program of the Maryland State Arts Council (MSAC) with support from the National Endowment

80 <http://snohomishcountywa.gov/DocumentCenter/View/40218>.

81 <https://www.msac.org/grants/maryland-traditions-project-grant>.

82 https://www.msac.org/sites/default/files/files/maryland_traditions_FY2018_project_grant_guidelines.pdf.

for the Arts (NEA) Folk Arts Infrastructure Initiative.

Projects receiving grants have included an old-time fiddle competition, a row house arts festival, an oral history of oyster workers, a documentary focusing on traditional river baptisms on the Eastern Shore, and a recording of a master traditional Irish button accordion player. In addition to the awarded money, grant winners receive technical and networking assistance through the Maryland State Arts Council.⁸³

Learn more at: <https://www.msac.org/grants/maryland-traditions-project-grant>.

Vermont Downtown & Village Center Sales Tax Reallocation

The State of Vermont offers a unique program to incentivize new construction in Vermont's 24 designated downtowns. Vermont's sales reallocation program allows municipalities and developers to jointly apply to the state's Downtown Development Board to reallocate sales tax on construction materials used on the project. The state Downtown Development Board, located within the Agency of Commerce and Community Development, is composed of 11 members representing various state agencies and planning and development fields. It is responsible for strengthening and improving downtown areas.⁸⁴

To qualify, new construction projects must be in one of 24 state designated downtown districts, and projects must spend over \$100,000 on construction materials. The reallocated sales taxes are then awarded to the municipality to support the project, and typically go towards infrastructure improvements such as expanded sewer and water service, new storm water controls, and sidewalks.⁸⁵

Applications must be submitted just prior to construction or during construction, but not after construction has been substantially completed. Applications also must demonstrate that the construction project will be completed within 12 months of the award date, and the municipal project must be completed within 30 months.

As of the beginning of 2017, five sales tax allocation projects have been funded since the program's inception in 2011, all in conjunction with hotel construction. The program notes

83 <https://www.msac.org/grants/maryland-traditions-project-grant>.

84 http://governor.vermont.gov/boards_and_commissions/downtown_development.

85 <http://accd.vermont.gov/community-development/funding-incentives/sales-tax-reallocation>.

OTHER INCENTIVES OR FUNDING FOR HERITAGE PROJECTS



Construction of this 84-room Hampton Inn on a former vacant brownfield site in the heart of downtown St. Albans, VT cost \$11 million, and resulted in a sales tax reallocation of \$103,492. Reallocated sales taxes will support utility and storm water improvements, lighting, and landscaping along the street. Rendering source: St. Albans Messenger. <http://www.samessenger.com/downtown-city-to-rescue-for-hotel/>.

that not long ago, construction of new multi-story downtown buildings was limited. Over the last five years, however, the improving economy and a “renewed public interest in the

“The five projects generated \$1.2 million in reallocated sales taxes and \$80 million in private investment.”

convenience and charm of Vermont’s traditional main streets” has led to an interest in hotel construction in Vermont’s downtowns. The five projects generated \$1.2 million in reallocated sales taxes and \$80 million in private investment.⁸⁶

A \$19.7 million, four-story, mixed-use development is also underway that will include retail and office space, as well as a 1,500-person performing arts center. The nearly \$400,000 sales tax reallocation will fund the cleanup for a brownfield site for use as a public gathering space.

Learn more: <http://accd.vermont.gov/community-development/funding-incentives/sales-tax-reallocation>.

City of Chicago, Permit Fee Waiver Program

Since 1997, the city of Chicago has offered all individually landmarked buildings, as well as all buildings and new construction in landmark districts, the option to waive the cost for permit fees. Only fees for permits that require approval from the Commission on Chicago Landmarks can

be waived. Barricade, canopy, and water tap permits and fees are not eligible for the waiver.⁸⁷ The Permit Fee Waiver can save preservation projects hundreds of dollars.

The Permit Fee Waiver is presented to the city department issuing the permit at the time of final approval, and at the issuance of the permit prior to the payment of the permit fees. The fee waiver application process typically takes 90-120 days, so the application needs to be filed well in advance of the issuance of the permit. Permit Fee Waiver applications are not accepted after the permit has been issued.

The application has three parts: Personal Profile Information, Economic Disclosure Statement (EDS), and Affidavit of Child Support Compliance. Applicants must file these forms to show they comply with city ordinances governing disclosure of ownership information. This process also determines whether the applicant has any outstanding debts to the city (i.e., parking tickets and water bills) or child support obligations. The EDS, Affidavit of Child Support Compliance, and scofflaw clearances are valid for a limited time and may have to be repeated. The application is then forwarded to the alderman of the ward in which the property is located for introduction to the City Council.

Before it is valid, a Permit Fee Waiver must be introduced at one City Council meeting, referred to the committee, and then passed by the City Council at a subsequent meeting and published. A copy of the City Council Journal Pages for the Permit Fee Waiver is then obtained from the City Clerk’s office by the commission and given to the property owner, along with a cover memo releasing the waiver to the Department of Buildings.

Learn more at https://www.cityofchicago.org/content/dam/city/depts/zlup/Historic_Preservation/Publications/Permit_Fee_Waiver_Info_Sheet_2014.pdf.

⁸⁶ <http://accd.vermont.gov/sites/accdnew/files/documents/CD/CPR/DHCD-HTC-STR-Annual-Report.pdf>.

⁸⁷ https://www.cityofchicago.org/content/dam/city/depts/zlup/Historic_Preservation/Publications/Permit_Fee_Waiver_Info_Sheet_201.

CONCLUSION

Heritage organizations are a creative lot. For generations, they have identified traditional and out of the ordinary funding sources to support their local projects.

Virtually every state offers direct grant support for historic preservation or heritage projects beyond the federal Certified Local Government Program (CLG). Other traditional funders include state Arts and Humanities Councils. Some states offer tens of millions of dollars in matching grants every year for program, planning, or construction matching grant projects, like Oregon, Minnesota, Maryland, and New Jersey. We know that these funding resources change from year to year due to budget concerns and political whim, creating backlogs of unmet needs and projects that are simply never finished. States with business or income tax incentives most often cap these incentives yearly to assure that that the incentive does not drain the state budget of revenue.

We also found that there were very few new incentives enacted in the last five years. The 1980s saw the advent of state tax credit programs to mimic the Federal Historic Preservation Tax Credits, and now 34 states have them for income producing properties. Advocates in some states like Oregon and New Jersey continue to actively pursue such state tax credits because they see the clear impact they have had in neighboring states.

Main Street managers are often told that the downtown revitalization movement relies on R and D, meaning “rip-off and duplicate, “ to fuel innovation at the local level. It is not necessary to reinvent the wheel when someone has done a superlative job on a similar incentive program just two states away. The programs we profile here are excellent candidates for such R and D in Oregon. It is just a matter of deciding what is possible at the local, county, and statewide level and gathering advocates together to press forward.

NEXT STEPS

Oregon is a special place, an array of regions with their own characters and stories. Together those regions share the value of this place. Whether the people who live in and visit Oregon recognize local history as part of that value or not, it is key to Oregon’s character. When people shop in a historic downtown, enjoy a beer in a historic building, catch an exhibit at the local library, take visitors to a museum, read an interpretive panel on a trail, explore a historic cemetery, or attend a local festival they are appreciating Oregon Heritage. In fact, they are heritage activists.

It is our job as organizations doing heritage work to help those people recognize their appreciation of local historic resources. We must also encourage them to share the value with community members, elected officials, tourism organizations, and others to ensure a groundswell of support for heritage.

This report is intended to stimulate action. As a group of heritage proponents, we must use the tools available now and develop additional tools in order strengthen financial support for heritage efforts regionally and statewide. We need to think beyond our individual organizations, for the benefit of our organizations as well as others. Through this report and the results of the Oregon Heritage Summit, Oregon Heritage is committed to providing technical assistance to such efforts.

Actions you can take:

- Tomorrow have a board member, member or visitor give a letter, email or call to your city council members or

state representatives about how important the work you do is.

- For your next event, invite local elected officials.
- For your next grant award or completed project send a press release.
- Schedule a brown bag lunch or coffee meeting with other heritage organizations in your area and talk about options to initiate or support.
- Support funding options that already exist.
- The Oregon Cultural Trust is a great mechanism to increase funding for local projects. As the fund grows, so does the funding available for heritage projects.
 - Be sure your organization is listed as a nonprofit partner
 - Promote the tax credit in your funding appeals and thank you letters.
- Local county funding is a great local opportunity
 - Ensure your supporters understand the benefit of the program.
 - Let county officials know the value to your organization.
 - Work to make sure heritage is part of the work supported by tourism funding.

The Oregon Heritage Commission will take input from the Oregon Heritage Summit to understand what tools are needed to forward the effort to fund heritage. They will work to find partners and resources to develop those tools. Together we can strive to rally heritage activists across the state to better support Oregon heritage efforts.

CREDITS

Donna Ann Harris was the primary author of this report with the assistance of interns Helen Gassmann and Sarah Johnson, who conducted initial research and wrote profiles for review.

Donna Ann Harris is the principal of Heritage Consulting Inc., a Philadelphia-based Women's Business Enterprise (WBE) consulting firm that aids non-profit organizations and government agencies nationwide in the following practice areas: downtown and commercial district revitalization, historic preservation, tourism product development, and non-profit organizational development.

Prior to starting her firm thirteen years ago, Ms. Harris was the state coordinator for the Illinois Main Street program for two years and the manager of the Illinois suburban Main Street program for four years. Prior to her Main Street career, Ms. Harris spent 15 years as an executive director of three start-ups and two mature preservation organizations, each with its own organizational and fundraising challenges.

Since starting her firm, Ms. Harris has worked with state, regional, and local Main Street programs in 23 states. She has written six feature articles in the National Main Street Center's quarterly publication *Main Street Now* and is a regular contributor to their *Main Street Week* blog. She has also spoken at the Main Street Center's annual conference for the last dozen years and has conducted webinars for the Center on fundraising and organizational development topics. Ms. Harris has authored scholarly articles in the American Association for State and Local History's *History News* and the National Trust's *Forum Journal*. Ms. Harris's book *New Solutions for House Museums: Ensuring the Long-Term Preservation of America's Historic Houses* was published by AltaMira Press in 2007. Ms. Harris is a Certified Main Street Manager.

Interns and consultants who undertook research and writing for this project.

Helen Gassmann is a public historian and museum professional based in Philadelphia, PA. Helen is a graduate of Temple University with a BA in History, and of Villanova University with an MA in Public History. She has held roles in membership coordination, communications, and public engagement at museums and heritage organizations in Philadelphia. Helen specializes in connecting people to history through guided tours and educational programming.

Sarah Johnson is a public historian focused in community revitalization and historic preservation. Sarah is a graduate of University of Wisconsin-Milwaukee with a BA in History, and of Villanova University with a MA in Public History and Graduate Certificate in Nonprofit Management. Sarah has held positions in both the historic preservation field and nonprofit settings around the Philadelphia region. She continues to dedicate her time and passion toward neighborhood revitalization through community outreach, historic preservation, and sustainability practices. Sarah is a native of Chicago, and a proud transplant of Philadelphia.

Contact

Donna Ann Harris Heritage Consulting Inc.
422 South Camac Street
Philadelphia, PA 19147
215 546 1988
donna@heritageconsultinginc.com
www.heritageconsultinginc.com

What happens when a World Heritage City can't support its own heritage? | Opinion

Updated: April 19, 2019 - 1:47 PM

Patrick Spero



ALEJANDRO A. ALVAREZ / STAFF PHOTOGRAPHER



The two recent shockwaves in the history community involving [the closing of the Philadelphia History Museum](#) and [a staff reduction at the Historical Society of Pennsylvania](#) didn't come as a complete surprise, but their quick succession has led many to question the future of collections-based historical institutions in the city. The Philadelphia History Museum, with more than 130,000 artifacts, and the Historical Society, with its 20 million pages of manuscripts, are the two greatest stewards of the city's history. What does it say if Philadelphia, the United States' first UNESCO World Heritage City, cannot support its own heritage?

Up to this point, there has been something of a “Philadelphia model” for how struggling cultural institutions, especially collections-based ones, can deal with financial crises. Both the [Academy of Natural Sciences of Philadelphia’s merger with Drexel](#) and the [Rosenbach’s partnership with the Free Library](#) Foundation saved them from the fate that the Philadelphia History Museum and the Historical Society now face and have served as exemplars of this model. In both cases, a smaller organization formed a long-lasting, strategic partnership with a larger, more financially secure institution. And in each instance, the more stable organization assumed some governance responsibilities and provided a stronger financial footing through direct aid, integrated fund-raising, and administrative support.

RELATED STORIES

- **Layoffs at the Historical Society have been a long time coming**
- **Saving Philly’s endangered history, one building at a time | Opinion**
- **Looking for the future of historical institutions, as America’s 250th birthday looms | Opinion**

The apparent success of these two well-known collaborations has fueled others to seek similar deals. But there are only so many larger institutions in town, and only so many institutions they can take on. This model cannot be sustainable.

It is time to explore different approaches to institutional sustainability. Rather than “looking up” for saviors, institutions of similar sizes and with comparable collections-based missions, even those in a strong financial position, should “look sideways” to each other, and ask how they can work with their peers to lift their collective well-being.

Many institutions are pursuing such work through joint programming. But while these group efforts at public outreach are frequent and successful, fewer have cast their eyes to the ways institutions can partner on back-end administrative systems.

Consider the inherent redundancy in small and middle-sized nonprofits. Why should, say, five separate nonprofits with \$20 million endowments have five CFOs when a nonprofit with \$100 million can make do with just one? And what if these five hypothetical institutions pooled their relatively small endowments to create a larger one, which would provide them with access to more sophisticated financial instruments?

There are other areas in which joint administration might create efficiencies and build greater opportunities for these institutions and their users. A group of collections-based institutions could adopt and share systems, such as the consortia for a shared ticketing system among many performing arts organizations in Philadelphia. Collection storage and care are also similar responsibilities of these institutions. There may be ways institutions can reach beyond their walls, connect collections, and share the cost of their stewardship of our region’s and nation’s treasures.

Such a model would not only provide financial support by reducing costs. It would also empower each institution to focus fully on its programmatic mission. Perhaps the biggest hurdle is that such efforts require institutions to cede some level of administrative independence, even if the inspiring mission of each member stayed untouched.

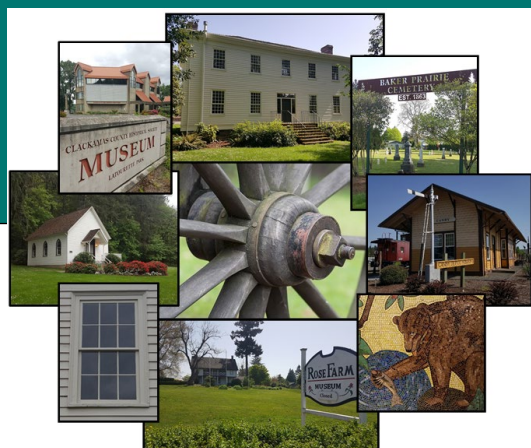
But that may just be the reason it is right for Philadelphia. Collaboration is embedded in our city’s DNA. The Quaker tradition that has guided the city since its founding cherishes community and humility over individualism and ego. Philadelphia’s greatest citizen, Benjamin Franklin, led the city by encouraging civic action rather than competitiveness. And let’s not forget that in 1776 and then again in 1787, it was in this city that leaders facing a collective crisis put aside their individual concerns and came together in a great experiment that changed the world.

Even if such a model would prove infeasible, I offer it here as a way to show that this moment provides an opportunity for Philadelphia to once again be innovative. And the problem is not faced by our city alone. Nonprofits throughout the country are facing many of the same challenges. Once again, Philadelphia has a chance to experiment and build a new model that can be adopted elsewhere. We should see this moment as an opportunity to not only solve our problem but once again lead the nation.

Patrick Spero is the librarian and director of the American Philosophical Society Library. His most recent book is “Frontier Rebels: The Fight for Independence in the American West, 1765-1776” (W.W. Norton, 2018).

CLACKAMAS COUNTY HISTORY HUB CONCEPT

SUSTAINABILITY, GROWTH & COLLABORATION



WHAT IS THE CLACKAMAS COUNTY HISTORY HUB?

Functioning as a hub, the CCHH would consolidate funding and hire experts in key roles that would share their services with all of the participating heritage organizations. This would provide a level of expertise that the individual sites currently cannot afford and greatly increase the organizations' capacity to reach emerging audiences.

The goals of the Clackamas County History Hub would be to:

- Establish **stable funding** for organizations involved in historical interpretation and preservation activities within Clackamas County.
- Develop a **collaborative**, sustainable, business model for the heritage organizations within Clackamas County. Provide **shared services** such as **technology, marketing, and fundraising**. Assist heritage organizations in reaching their full potential to better serve the public and develop these unique community assets.
- **Preserve** and **promote** the county's rich history.
- Assist member organizations in **capacity building**.
- **Serve the needs of the residents** of Clackamas County.

WHAT SERVICES WOULD BE PROVIDED? - DRAFT

Core Services: Fulfilled by Clackamas County History Hub staff.

Marketing & Technology

- Consolidate local (<50 mile radius) marketing efforts.
- Provide digital content, engage the public and promote activities via social media and online.

Audience Engagement:

- Enhance volunteer programs.
- Audience development.
- Aid in developing programming to reach a wider audience.

Development (Fundraising)

- Leverage public support to provide additional services.
- Grant writing assistance for participating organizations and emphasis on those projects that involve collaboration.
- Offer sponsorships across organizations to encourage higher levels of support.

Secondary Services: Fulfilled through mentorship programs, consultants, and workshops.

Operations:

Aid organizations with Board training, strategic planning, training opportunities, and leveraging purchasing power. To promote activities in-line with current scholarship and best practices, History Hub would join professional organizations and share publications and training opportunities with the participating heritage organizations.

Curatorial

Offer collection and exhibition planning, shared collections management software, and coordinating public exhibits that bring the Museums to the people. Depending on the needs of participating organizations there has been some interest in exploring a shared collections storage space.

Historic Preservation

Provide funding to update Historic Building Inventories, promoting Preservation activities, Historic Review Board training.

History Award Program

Promote and recognize service and restoration efforts by individuals, businesses and other organizations within the county.

WHO IS ELIGIBLE TO PARTICIPATE?

Organizations must meet all of the following criteria:

- Nonprofit Organizations and Government Entities
- Actively engaged in historical interpretation or preservation
- Core mission of historical interpretation or preservation
- Operating within Clackamas County

REQUIREMENTS OF PARTICIPANTS?

- Free admission for Clackamas County Residents
- Discounted school programs for schools within the county, where applicable. Lost revenue would be subsidized by Hub.
- Complete / Update a Heritage Assessment Survey.
- Commit to a minimum number of hours open to the public.
- Provide one newsletter / blog article per year.
- Maintain active membership in the Clackamas County Heritage Council and attend 75% of the meetings each year.
- History Hub staff member as a non-voting, ex-officio member of the participating organization's board.

WHAT ARE THE BENEFITS?

Organization Type	Benefits
<p style="text-align: center;">Tier One Organizations with physical sites offering historical interpretation.</p>	<ul style="list-style-type: none"> • Grant Based on Operational Budget • Grants for Special Projects & Operations • Access to History Hub • Heritage Preservation Awards <ul style="list-style-type: none"> • Lost Revenue Reimbursement for Discounted School Tours and Admission • Funding Assistance for Front Door Staff
<p style="text-align: center;">Tier Two Interpretive Orgs. & Historical Societies without buildings, Historic Review Boards, Archives, & Genealogical Centers</p>	<ul style="list-style-type: none"> • Grants Based on Operational Budget. • Grants for Special Projects • Access to History Hub • Heritage Preservation Awards

HISTORY RELEVANCE CAMPAIGN

THE VALUE OF HISTORY

SEVEN WAYS IT IS ESSENTIAL »

TO OURSELVES

- **IDENTITY »** History nurtures personal identity in an intercultural world. History enables people to discover their own place in the stories of their families, communities, and nation. They learn the stories of the many individuals and groups that have come before them and shaped the world in which they live. There are stories of freedom and equality, injustice and struggle, loss and achievement, and courage and triumph. Through these varied stories, they create systems of personal values that guide their approach to life and relationships with others.
- **CRITICAL SKILLS »** History teaches critical 21st century skills and independent thinking. The practice of history teaches research, judgment of the accuracy and reliability of sources, validation of facts, awareness of multiple perspectives and biases, analysis of conflicting evidence, sequencing to discern causes, synthesis to present a coherent interpretation, clear and persuasive written and oral communication, and other skills that have been identified as critical to a successful and productive life in the 21st century.

TO OUR COMMUNITIES

- **VITAL PLACES TO LIVE AND WORK »** History lays the groundwork for strong, resilient communities. No place really becomes a community until it is wrapped in human memory: family stories, tribal traditions, civic commemorations. No place is a community until it has awareness of its history. Our connections and commitment to one another are strengthened when we share stories and experiences.

- **ECONOMIC DEVELOPMENT »** History is a catalyst for economic growth. People are drawn to communities that have preserved a strong sense of historical identity and character. Cultural heritage is a demonstrated economic asset and an essential component of any vibrant local economy, providing an infrastructure that attracts talent and enhances business development.

TO OUR FUTURE

- **ENGAGED CITIZENS »** History helps people craft better solutions. At the heart of democracy is the practice of individuals coming together to express views and take action. By bringing history into discussions about contemporary issues, we can better understand the origins of and multiple perspectives on the challenges facing our communities and nation. This can clarify misperceptions, reveal complexities, temper volatile viewpoints, open people to new possibilities, and lead to more effective solutions for today's challenges.
- **LEADERSHIP »** History inspires local and global leaders. History provides leaders with inspiration and role models for meeting the complex challenges that face our communities, nation, and the world. It may be a parent, grandparent or distant ancestor, a local or national hero, or someone famous or someone little known. Their stories reveal how they met the challenges of their day, which can give new leaders the courage and wisdom to confront the challenges of our time.
- **LEGACY »** History, saved and preserved, is the foundation for future generations. History is crucial to preserving democracy for the future by explaining our shared past. Through the preservation of authentic, meaningful places, documents, artifacts, images, and stories, we leave a foundation upon which future Americans can build. Without the preservation of our histories, future citizens will have no grounding in what it means to be an American.

Museums as Economic Engines

In 2017, the American Alliance of Museums partnered with Oxford Economics to study the museum sector's significant contribution to the US economy.

Source: Oxford Economics, IMPLAN, 2017.

\$585 million

The total financial impact that museums have on the economy in Oregon



9,740 jobs

Important jobs within the state are supported by the museum industry each year.



\$404m income

Museums provide substantial wages and other income to the state's residents annually.



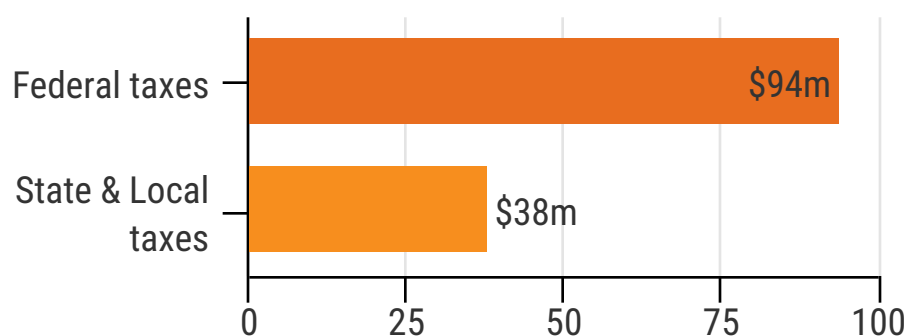
\$132m taxes

Even though many museums operate as nonprofits, they generate significant tax revenues to the federal, state, and local governments.

89%

Regardless of political persuasion, 89% of Americans believe that museums provide important economic impacts back to their communities.

Source: AAM's Museums & Public Opinion 2017



**American
Alliance of
Museums**

75

Economic Impact of Heritage Organizations

Cultural Heritage Travelers in Oregon by the Numbers

The Number	The Fact
19.6 billion	Amount of dollars spent by cultural and heritage travelers on their most recent trip to Oregon.
83	Percent of leisure travelers in Oregon who consider themselves cultural and heritage travelers.
47.5 million	Number of people who are cultural heritage travelers within Oregon and its feeder markets.
1,618	Average amount of dollars spent by a cultural heritage traveler on a leisure trip in Oregon. This is nearly 60% higher than cultural heritage travelers spend nationally.
45	Percent of Oregonians who spend more on cultural heritage activities while they are on a trip.
39	Percent of Travelers will pay more for lodging that reflects the cultural heritage destination they are visiting
1200	Number of cultural heritage organizations in Oregon
57%	Number of all Americans who visit a museum or historic site each year. Americans give museums and historic sites their highest level of confidence (versus eyewitnesses, professors, teacher, books, movies, and television) as a source of information about the past. American rate museums and historic sites as the second most effective way (after family gatherings) in which Americans feel connected to the past.
\$118 million	The estimated direct economic contribution (investments, salaries, and purchases) of Oregon's heritage institutions. Based on a survey of one-third of Oregon's heritage institutions.
23,000	Involvement with the past gives people a sense of belonging, direction, and meaning. Estimated number of Oregonians who regularly volunteer their time at heritage institutions.
28%	Percent of Oregon's domestic overnight pleasure travelers (4.8 million people) who enjoy historic sites and attractions, making this one of the state's top tourism activities. These visitors spending, when added to day-traveler spending associated with historic sites, amount to nearly a billion dollars annually.
\$210	Amount heritage travelers spend on average more per trip than the non-heritage traveler. They stay 1.4 nights longer than the average traveler, are more likely to shop, and are more likely to stay in hotels and motels rather than with friends or relatives.

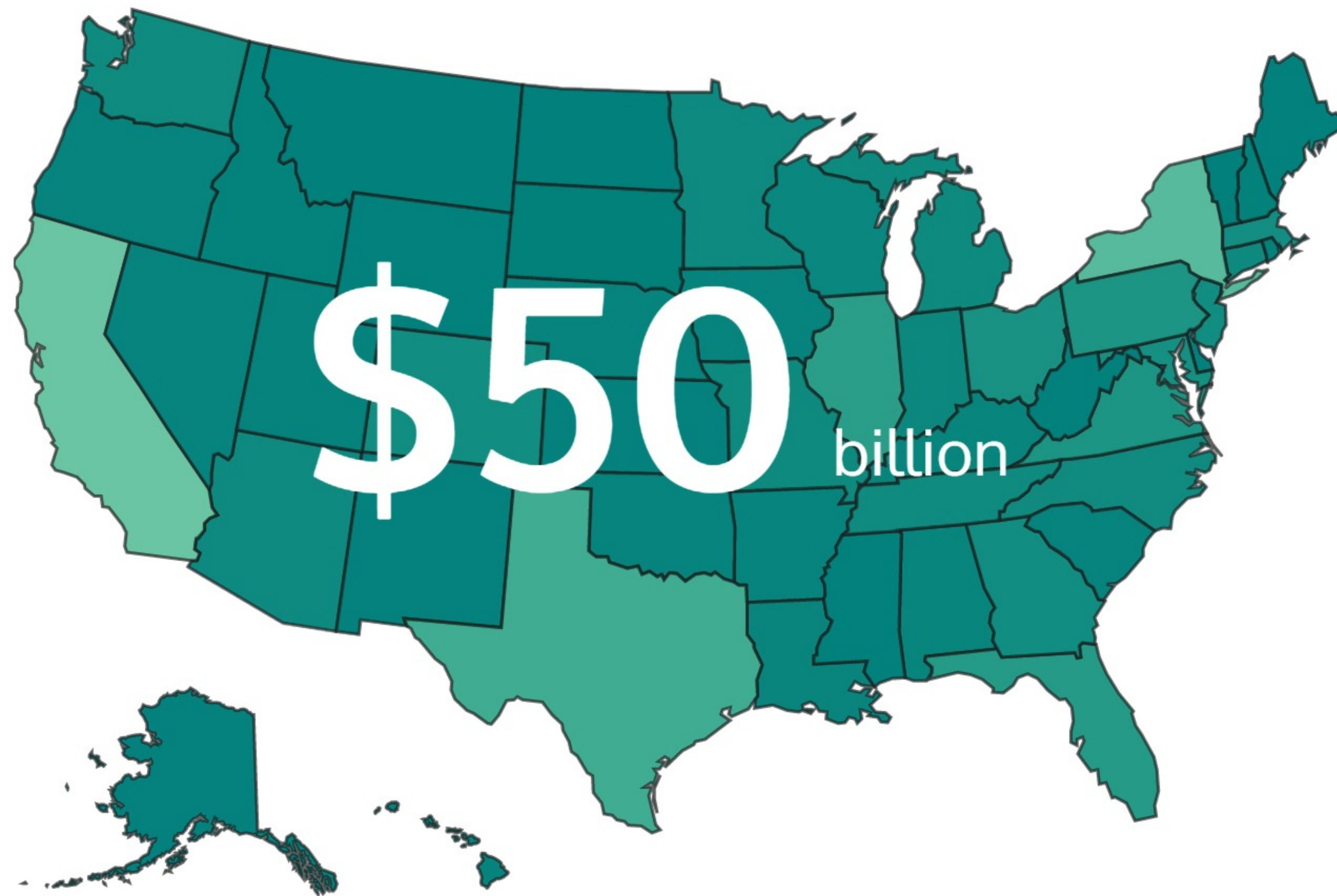
Source: "Oregon Cultural and Heritage Travelers Study, October 2012," by Mandala Research, LLC, a study organized by the Oregon Heritage Commission and paid for with donations to the Oregon Cultural Trust. See www.oregonheritage.org for a copy of the full study.

www.oregon.gov/oprd/HCD/OHC/pages/facts.aspx

Museums as Economic Engines

In 2017, the American Alliance of Museums partnered with Oxford Economics to study the museum sector's significant contribution to the US economy.

Source: Oxford Economics, IMPLAN, 2017.



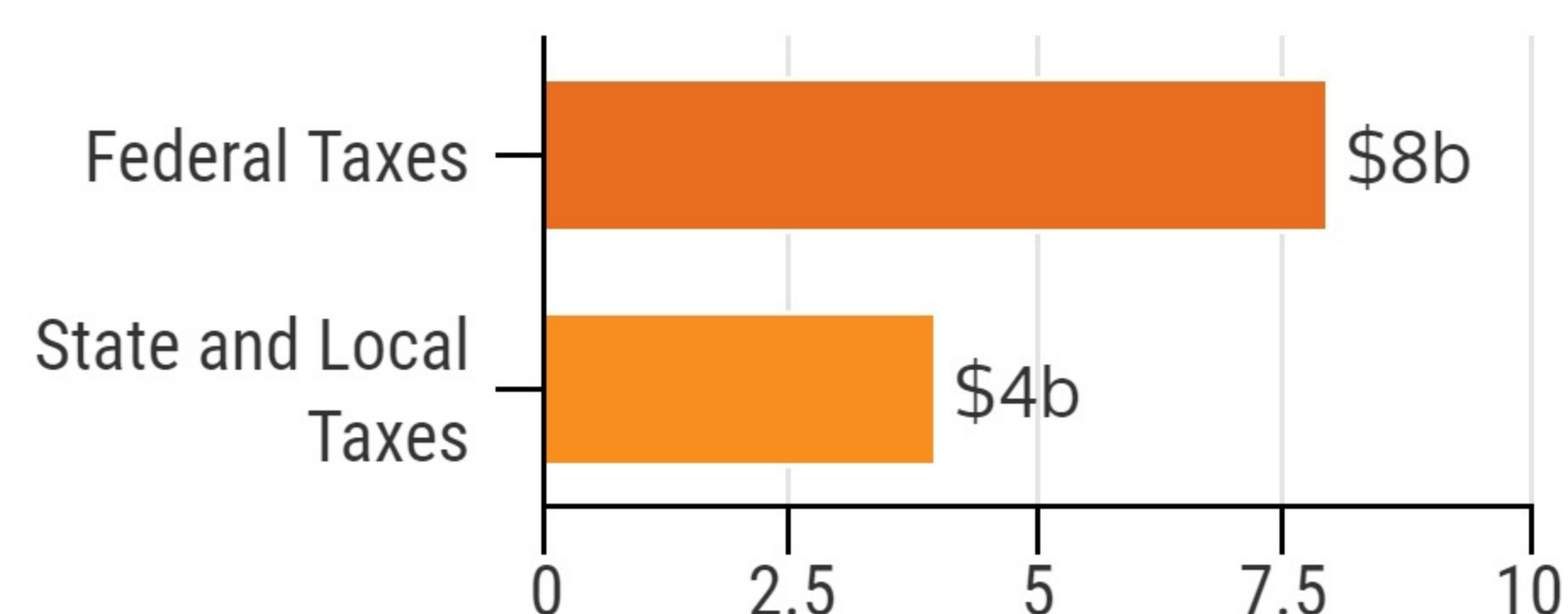
Museums in the United States contribute nearly \$50 billion dollars annually to the nation's economy.

State	GDP
1. California	\$6.6 billion
2. New York	\$5.4 billion
3. Texas	\$3.9 billion
4. Illinois	\$2.7 billion
5. Florida	\$2.3 billion

Top 5 States by GDP Contribution

\$12b taxes

Even though many museums operate as nonprofits, they generate significant tax revenues to federal, state, and local governments.



726,000 jobs

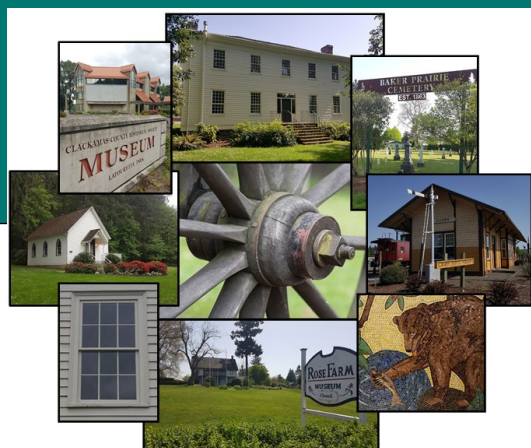
Each year, the museum sector supports important jobs for people in every corner of the nation.



American Alliance of Museums

CLACKAMAS COUNTY HISTORY HUB CONCEPT

SUSTAINABILITY, GROWTH & COLLABORATION



WHAT IS THE CLACKAMAS COUNTY HISTORY HUB?

Functioning as a hub, the CCHH would consolidate funding and hire experts in key roles that would share their services with all of the participating heritage organizations. This would provide a level of expertise that the individual sites currently cannot afford and greatly increase the organizations' capacity to reach emerging audiences.

The goals of the Clackamas County History Hub would be to:

- Establish **stable funding** for organizations involved in historical interpretation and preservation activities within Clackamas County.
- Develop a **collaborative**, sustainable, business model for the heritage organizations within Clackamas County. Provide **shared services** such as **technology, marketing, and fundraising**. Assist heritage organizations in reaching their full potential to better serve the public and develop these unique community assets.
- **Preserve** and **promote** the county's rich history.
- Assist member organizations in **capacity building**.
- **Serve the needs of the residents** of Clackamas County.

WHAT SERVICES WOULD BE PROVIDED? - DRAFT

Core Services: Fulfilled by Clackamas County History Hub staff.

Marketing & Technology

- Consolidate local (<50 mile radius) marketing efforts.
- Provide digital content, engage the public and promote activities via social media and online.

Audience Engagement:

- Enhance volunteer programs.
- Audience development.
- Aid in developing programming to reach a wider audience.

Development (Fundraising)

- Leverage public support to provide additional services.
- Grant writing assistance for participating organizations and emphasis on those projects that involve collaboration.
- Offer sponsorships across organizations to encourage higher levels of support.

Secondary Services: Fulfilled through mentorship programs, consultants, and workshops.

Operations:

Aid organizations with Board training, strategic planning, training opportunities, and leveraging purchasing power. To promote activities in-line with current scholarship and best practices, History Hub would join professional organizations and share publications and training opportunities with the participating heritage organizations.

Curatorial

Offer collection and exhibition planning, shared collections management software, and coordinating public exhibits that bring the Museums to the people. Depending on the needs of participating organizations there has been some interest in exploring a shared collections storage space.

Historic Preservation

Provide funding to update Historic Building Inventories, promoting Preservation activities, Historic Review Board training.

History Award Program

Promote and recognize service and restoration efforts by individuals, businesses and other organizations within the county.

WHO IS ELIGIBLE TO PARTICIPATE?

Organizations must meet all of the following criteria:

- Nonprofit Organizations and Government Entities
- Actively engaged in historical interpretation or preservation
- Core mission of historical interpretation or preservation
- Operating within Clackamas County

REQUIREMENTS OF PARTICIPANTS?

- Free admission for Clackamas County Residents
- Discounted school programs for schools within the county, where applicable. Lost revenue would be subsidized by Hub.
- Complete / Update a Heritage Assessment Survey.
- Commit to a minimum number of hours open to the public.
- Provide one newsletter / blog article per year.
- Maintain active membership in the Clackamas County Heritage Council and attend 75% of the meetings each year.
- History Hub staff member as a non-voting, ex-officio member of the participating organization's board.

WHAT ARE THE BENEFITS?

Organization Type	Benefits
<p style="text-align: center;">Tier One Organizations with physical sites offering historical interpretation.</p>	<ul style="list-style-type: none"> • Grant Based on Operational Budget • Grants for Special Projects & Operations • Access to History Hub • Heritage Preservation Awards <ul style="list-style-type: none"> • Lost Revenue Reimbursement for Discounted School Tours and Admission • Funding Assistance for Front Door Staff
<p style="text-align: center;">Tier Two Interpretive Orgs. & Historical Societies without buildings, Historic Review Boards, Archives, & Genealogical Centers</p>	<ul style="list-style-type: none"> • Grants Based on Operational Budget. • Grants for Special Projects • Access to History Hub • Heritage Preservation Awards

May 15, 2019

Clackamas County Board of Commissioners:

Jim Bernard, Chairperson
Martha Schrader, Commissioner
Sonya Fischer, Commissioner
Ken Humbertson, Commissioner
Paul Savas, Commissioner

From: Organizations related to Clackamas County history and heritage

Re: Support for Proposed History Hub

Dear Board of Commissioners:

We, the undersigned, history/heritage organizations in Clackamas County, would like to strongly urge the Clackamas County Board of Commissioners to continue supporting the heritage organizations of Clackamas County and enable the creation of the Clackamas County History Hub.

Clackamas County has a rich history and pre-history, and we are proud to be one of the more than 40 organizations in the county working to preserve, interpret and share that history with residents and tourists. Unfortunately, because we are small and reliant on volunteer services and funds, we do not have the ability or resources to provide the amount and kind of services and programs to the public as we would like. Because of our limited time and expertise, for example, we are limited in our ability to engage in extensive fundraising, development of new programs, advertising or other efforts needed to expand our organization and provide more and better services for the public.

However, the Clackamas County History Hub could change all that, for us and for the other history/heritage organizations in the county. Through the History Hub, we and our partner organizations and governments would have access to centralized, focused resources – such as volunteer training, fundraising, marketing and technology – to help build our programs, expand our reach, and better serve Clackamas County residents.

It is not practical or possible for 40+ organizations to each create their own infrastructure of staff and resources. The Clackamas County History Hub would provide much-needed expertise and staff resources in an efficient and effective way.

The History Hub would be made up of nonprofit and government organizations operating in Clackamas County that are actively engaged in historical interpretation or preservation. The History Hub would allow us to:

- Establish stable and consistent funding
- Develop a collaborative, sustainable business model
- Benefit from shared services, including technology, training and fundraising
- Expand our efforts to preserve and promote the county's rich history and heritage
- Expand our capacity-building efforts
- Better serve the needs of Clackamas County residents and visitors

Clackamas County has and will continue to play a significant role in the history of this state and this nation. Learning about and understanding the past is not only enjoyable for many people, but can also help everyone better respond to the present and prepare for the future.

We urge you to give serious consideration to turning your appreciation for the history of this county into a commitment to ensuring that our history is kept alive for generations to come.

Thank you.

Sincerely,

- Clackamas County Heritage Council
- Clackamas Heritage Partners (See additional support statement)
End of the Oregon Trail Interpretive Center
- Oak Lodge History Detectives
- West Linn Historical Society

Additional Support Statements:

The last two years working with Jennifer Burns has been exciting; working with partners, collaborating and brain storming to create a vibrant future for all our community has to offer. Vibrant historical sites and committed historians, building a strong economy for Clackamas County by intriguing locals and travelers. Visitors want all we have to offer, open and thriving.

The Clackamas County History Hub Concept benefits are extremely significant, since we cannot afford to hire a staff person with these skills on a full or part-time basis. We operate on a moderate budget to survive. Investing in programs and projects that have a direct impact for visitors, is our primary focus. We would welcome all of the support this plan outlines. Thank you for considering the wealth of opportunity the History Hub offers.

Sincerely,
Gail Yazzolino,
Executive Director
End of the Oregon Trail Interpretive Center
gail@historicoregoncity.org



City of Canby

PO Box 930 Phone: 503.266.4021
222 NE 2nd Ave Fax: 503.266.7961
Canby, OR 97013 www.canbyoregon.gov

Canby Heritage and Landmark Commission
222 NE 2nd Ave
Canby, Oregon 97013

April 1, 2019

Clackamas County Board of Commissioners
Jim Bernard, Chairperson
Martha Schrader, Commissioner
Sonya Fischer, Commissioner
Ken Humbertson, Commissioner
Paul Savas, Commissioner

Re: Support for Proposed History Hub

Dear Board of Commissioners:

At our April 1, 2019 meeting, the Canby Heritage and Landmark Commission voted to support the proposed History Hub and strongly urge the Clackamas County Board of Commissioners to support and enable its creation.

Clackamas County has a rich history and pre-history, and we are proud to be one of the more than 40 organizations in the county working to preserve, interpret and share that history with residents and tourists. Unfortunately, because many of our county's heritage organizations are small and reliant on volunteer services and funds, they do not have the ability or resources to provide the amount and kind of services and programs to the public. Our projects and programs that support historic preservation are dependent on many of these small organizations.

However, the Clackamas County History Hub could change all that, for us and for the other history/heritage organizations in the county. Through the History Hub, we and our partner organizations and governments would have access to centralized, focused resources – such as volunteer training, fundraising, marketing and technology – to help build our programs and expand our reach.

The History Hub would be made up of nonprofit and government organizations operating in Clackamas County that are actively engaged in historical interpretation or preservation. The History Hub would allow us to:

- Establish stable and consistent funding
- Develop a collaborative, sustainable business model
- Benefit from shared services, including technology, training and fundraising
- Expand our efforts to preserve and promote the county's rich history and heritage
- Expand our capacity-building efforts
- Better serve the needs of Clackamas County residents and visitors

In turn, we will commit to:

- Being an active member of the Clackamas County Heritage Council
- Conducting a heritage assessment survey
- Having a History Hub staff member serve as an ex-officio member of our commission

Clackamas County has and will continue to play a significant role in the history of this state and this nation. Learning about and understanding the past is not only enjoyable for many people, but can also help everyone better respond to the present and prepare for the future.

We urge you to give serious consideration to turning your appreciation for the history of this county into a commitment to ensuring that our history is kept alive for generations to come.

Thank you.

Sincerely,

A handwritten signature in black ink that reads "Tony Crawford". The signature is written in a cursive style with a large, sweeping flourish at the end.

Canby Heritage and Landmark Commission, Tony Crawford, Chairperson



Clackamas County Historical Society

P.O. BOX 2211, Oregon City, OR 97045 • 503-655-5574

www.clackamashistory.org

May 13, 2019

Dear Clackamas County Commissioners,

On behalf of the Clackamas County Historical Society, a history/heritage organization in Clackamas County, we strongly urge the Clackamas County Board of Commissioners to continue supporting the heritage organizations of Clackamas County. The concept of a History Hub could play an important role in that support. As a means of providing support and assistance to heritage organizations, it could help enhance the preservation and interpretation of our local history. The main concerns that we have, and the reason for our separate letter, focus on the implementation of the Hub. We believe that some of these details should be worked through prior to approval of the concept.

Best regards,

Clackamas County Historical Society
Board of Directors

Museum of the Oregon Territory • Stevens-Crawford Heritage House
Tax ID # 93-6024919



Clackamas County Board of Commissioners

March 28, 2019

Dear Friends of History,

Clackamas County is known all over the world for its historic role as the destination of America's Great Migration. That heritage is an irreplaceable resource for tourism and for local identity and cultural pride for both native and immigrant residents.

The Philip Foster Farm reaches thousands of school children and families each year with the story of the Oregon Trail and the pioneers who worked together to bring Oregon into the Union. Our hands-on activities provide a memorable experience accessible to all ages.

Our part-time staff and dedicated volunteers struggle each year to provide the best possible experience, but we can't afford the kinds of resources and expertise to be a world-class museum. Neither can the other 30 museums in our county, most run by volunteers, and all fighting for sustainability and local support.

The History Hub concept as developed by Jennifer Burns, Clackamas County's Heritage Project Coordinator, is the first ray of hope for providing Clackamas County residents with unfettered access to heritage stories we can be proud of.

Please help us find a way to consistently fund excellent heritage resources that will support both tourism and local involvement in our rich history. The county has been relying on its historians for decades. Let's give them back the help they need to preserve this treasured legacy.

Thank you for your consideration.

Sincerely yours,

A handwritten signature in black ink, which appears to read 'Libby Burke'. The signature is fluid and cursive, with a long horizontal line extending to the right.

Libby Burke, MLIS, Certified Archivist
President, Board of Directors
Jackknife-Zion-Horseheaven Historical Society (operating Philip Foster Farm)

McLoughlin Memorial Association

713 Center Street, Oregon City, Oregon 97045 • 503-656-5146
mcloughlinmemorial@gmail.com • 501(c)3 non-profit
P.O. Box 3261, Oregon City, OR 97045



*McLoughlin House/Barclay House Complex
Holmes House Museum at the Rose Farm*

May 9, 2019

To: Board of County Commissioners

We, the undersigned, history/heritage organizations in Clackamas County, would like to strongly urge the Clackamas County Board of Commissioners to continue supporting the heritage organizations of Clackamas County and enable the creation of the Clackamas County History Hub.

Clackamas County has a rich history and pre-history, and we are proud to be one of the more than 40 organizations in the county working to preserve, interpret and share that history with residents and tourists. Unfortunately, because we are small and reliant on volunteer services and funds, we do not have the ability or resources to provide the amount and kind of services and programs to the public as we would like. Due to our limited time and expertise, for example, we are limited in our ability to engage in extensive fundraising, development of new programs, advertising or other efforts needed to expand our organization and provide more and better services for the public.

However, the Clackamas County History Hub could change all that, for us and for the other history/heritage organizations in the county. Through the History Hub, we and our partner organizations and governments would have access to centralized, focused resources – such as volunteer training, fundraising, marketing and technology – to help build our programs, expand our reach, and better serve Clackamas County residents.

It is not practical or possible for 40+ organizations to each create their own infrastructure of staff and resources. The Clackamas County History Hub would provide much-needed expertise and staff resources in an efficient and effective way.

The History Hub would be made up of nonprofit and government organizations operating in Clackamas County that are actively engaged in historical interpretation or preservation. The History Hub would allow us to:

- Establish stable and consistent funding
- Develop a collaborative, sustainable business model
- Benefit from shared services, including technology, training and fundraising
- Expand our efforts to preserve and promote the county's rich history and heritage
- Expand our capacity-building efforts
- Better serve the needs of Clackamas County residents and visitors

Clackamas County has and will continue to play a significant role in the history of this state and this nation. Learning about and understanding the past is not only enjoyable for many people, but can also help everyone better respond to the present and prepare for the future.

We urge you to give serious consideration to turning your appreciation for the history of this county into a commitment to ensuring that our history is kept alive for generations to come.

Thank you.

Sincerely,


Joan Williams, President
McLoughlin Memorial Association

Sincerely,


Wendell Baskin, Chairperson
Rose Farm Management Committee



Clackamas County Commissioners
2051 Kaen Road
Oregon City, OR 97045
Re: History HUB Policy Session

April 25, 2019

Dear County Commissioners:

The Willamette Falls Heritage Area Coalition Board of Directors is actively engaged in supporting the Clackamas County Heritage Council. We are dues paying members and serve on the Executive Team of the organization. As a large, umbrella organization, we understand the challenges faced by museums and heritage groups in Clackamas County. We stay engaged with CCHC because we believe networking, advocacy, and sharing best practices are so important for heritage, museums, cultural organizations, and the work of preservation in Clackamas County.

When Clackamas county created a heritage coordinator position to assist heritage organizations, and museums with their collections, and with coordination efforts we were most supportive. We believe a History Hub may be of assistance to heritage sites and organizations in need of curatorial expertise, collections, programming, interpretation, etc., who find it financially impossible to provide such services on their own.

A History Hub could work in collaboration with existing organizations to serve the multiple heritage organizations within the County by:

- Providing common core services.
- Consolidating funding to leverage purchasing power.
- Hiring experts in key roles that would share their services.
- Coordinating collaborative efforts.
- Focusing on capacity building.
- Prioritizing projects based on collaborative efforts.

However, there are some major caveats:

1. What would the funding sources be?
2. What will the competition for those funding sources be?
3. How will those funds be allocated?
4. Who will determine how those funds are allocated?
5. Is there going to be a duplication of services already offered by existing organizations?
6. If there is a duplication of services, are we creating yet another organization? Perhaps the concept of a History Hub would be more effective as part of an already successfully operating organization.
7. Where will the History Hub live?

While our coalition is supportive of the History Hub in concept, all these concerns need to be addressed before Willamette Falls Heritage Area coalition can fully endorse the concept of a History Hub.

Sincerely,


Siobhan Taylor, Executive Director
Willamette Falls Heritage Area Coalition



Oregon

Kate Brown, Governor

Parks and Recreation Department

Oregon Heritage Commission

725 Summer St NE Ste C

Salem, OR 97301-1266

Phone (503) 986-0673

Fax (503) 986-0793

www.oregonheritage.org



May 13, 2019

Clackamas County Board of Commissioners
2051 Kaen Road
Oregon City OR 97045

Dear Clackamas County Commissioners,

On behalf of the Oregon Heritage Commission, I'm writing to express support for the work you and Clackamas County heritage organizations are doing to collaborate on solutions toward sustainable funding of heritage resources.

The Oregon Heritage Commission is a group of advisory and governor-appointed members who work collaboratively to champion resources, recognition, and funding for preserving Oregon's past. As the primary agency for coordination of heritage activities, the Commission works with more than 1,000 organizations in the state. Funding for heritage organizations is certainly a statewide concern. In 2010, the Oregon Heritage Commission conducted the *Oregon Heritage Vitality Study* to identify collective challenges heritage organizations across the state are facing. The study found that the biggest challenge facing Oregon's heritage community is the lack of stable funding from both government and private sources.

In 2017, Oregon Heritage followed-up by conducting the *National Survey of Heritage Funding and Incentive Programs: Opportunities for Oregon*. The research project provided an overview of nationwide funding and incentive programs for heritage resources to inspire Oregon stakeholders to implement similar projects in their town, county, or at the statewide level.

The Heritage Commission commends Clackamas County for identifying the value of your historic resources and actively bringing nonprofits and government together to consider opportunities to sustain funding for them. The Commission supports Clackamas County's efforts to succeed in a highly competitive funding environment.

Respectfully,

Todd Kepple
Oregon Heritage Commission Chair

