

# CLACKAMAS COUNTY BOARD OF COUNTY COMMISSIONERS

## Policy Session Worksheet

**Presentation Date:** 7/30/19 **Approx. Start Time:** 11:00 AM **Approx. Length:** 30 min.

**Presentation Title:** Clackamas County Heritage Project Update

**Department:** Business & Community Services

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

**Other Invitees:**

### WHAT ACTION ARE YOU REQUESTING FROM THE BOARD?

Staff will provide an update on the Heritage Project, discuss funding options for the Clackamas County History Hub concept, and ask the Board for direction on the creation of a County Heritage District.

### EXECUTIVE SUMMARY:

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 a combination of Oregon Lottery dollars and General Fund support via PGA.

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.

At a May 21, 2019 Policy Session, staff presented details of the History Hub concept to the Board. After the presentation, the Board requested that staff explore funding options for the History Hub concept, and return for a follow-up Policy Session at a later date.

During this Policy Session, staff will review the viability of different potential funding mechanisms examined, with a particular emphasis on the creation of a County Heritage

District (under ORS 358.442 – 358.474). The attached report contains additional information on funding options considered, County Heritage Districts in general, possible organizational structure of a County Heritage District, and the anticipated process for implementing a County Heritage District.

**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, with additional General Fund support via PGA.

Since the May 21, 2019 Policy Session, Clackamas County Tourism and Cultural Affairs (CCTCA) has agreed to provide \$25,000 in FY 19-20 to continue funding the Heritage Project Manager at 10 hours per week.

**STRATEGIC PLAN ALIGNMENT:**

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

The funding assistance provided by CCTCA will allow BCS to continue providing limited support of the Heritage Project during FY 19-20. If the Heritage Project continues past June 30, 2020, and/or if a County Heritage District were to be formed, it is unclear which County department would provide the needed support for and coordination of these efforts. At this time, BCS has neither the financial nor the operational capacity to oversee another district or manage the operations of the proposed Heritage Hub. While BCS recognizes the value of preserving and protecting the County’s heritage, continued support of heritage may better align with the strategic goals of another department or organization.

- 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 helping to create a network of more financially stable and sustainable heritage organizations.

**LEGAL/POLICY REQUIREMENTS:** None at this time.

**PUBLIC/GOVERNMENTAL PARTICIPATION:**

**OPTIONS:**

- 1) Do not pursue a County Heritage District at this time.
- 2) Move forward immediately with the creation of a County Heritage District. The Board would need to determine timing for the ballot measure, identify a department to provide staff support, and identify funding for necessary preparatory work (such as polling and an informational campaign).
- 3) Allow the heritage community sufficient time to raise necessary funding (estimated to be \$50,000) to support an advocacy campaign for creation of a County Heritage District. Once the heritage community has secured funding, move forward with the creation of a County Heritage District. The Board would need to determine timing for the ballot measure, identify a department to provide staff support, and identify funding for necessary preparatory work (such as polling and an informational campaign).

1) **RECOMMENDATION:**

Staff respectfully recommends the Board choose option #3, allow the heritage community sufficient time to raise necessary funding (estimated to be \$50,000) to support an advocacy campaign for creation of a County Heritage District. Once the heritage community has secured funding, move forward with the creation of a County Heritage District. The Board would need to determine timing for the ballot measure, identify a department to provide staff support, and identify funding for necessary preparatory work (such as polling and an informational campaign).

**ATTACHMENTS:**

- Clackamas County History Hub Funding Report

**SUBMITTED BY:**

Division Director/Head Approval \_\_\_\_\_

Department Director/Head Approval \_\_\_\_\_

County Administrator Approval \_\_\_\_\_

For information on this issue or copies of attachments, please contact Laura Zentner @ ext. 4351 or Jennifer Burns @ ext. 4356
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# Clackamas County History Hub Funding Report



*History Lives in Clackamas County*

July 30, 2019

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## 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 professional staff 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, technology, audience engagement, and fundraising.

At the May 14, 2019 Policy Session, County Commissioners requested that Staff explore mechanisms to fund the Clackamas County History Hub and return with additional information. At this time, the only viable funding mechanism that fulfills the goals and intent behind the Clackamas County History Hub is the creation of a County Heritage District under ORS 358.442 - 358.474.

The following report provides information on funding options considered, County Heritage Districts in general, possible allocation of funds, and the process for implementing a County Heritage District.

# Clackamas County History Hub Concept

(See Appendix: *History Hub Concept*)

The purpose of History Hub is to solve the challenges Clackamas County 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.

## History Hub Goals

- Build a collaborative organization to preserve and promote the County's rich history.
- Improve the financial stability of 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, but are not limited to, 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 to help organizations develop programs and exhibits that appeal to a diverse audience.

## History Hub Operations

The History Hub model provides member organizations with common core services. The History Hub organization would consolidate funding and hire professional staff 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 organizations' 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 performed by the general public, businesses, and other organizations.

# Funding Options Considered

The Clackamas County History Hub would require a dedicated, stable revenue source to fund operations. As part of the Heritage Project work, staff explored different funding options. The following funding mechanisms were considered and deemed inadequate or inappropriate to sustainably fund the History Hub.

## County Service Districts, ORS 451

ORS 451 provides for the creation of service districts for a variety of purposes. Under ORS 451, the Board of County Commissioners serves as the governing body of the County Service District. The North Clackamas Parks and Recreation District (NCPRD) and Clackamas County Library Service District are two examples of Districts formed under ORS 451.

While ORS 451 permits the creation of Districts to support park services, library services, and a variety of other services, none of the purposes outlined in 451.010 are related to heritage preservation or support, nor would they be applicable to the envisioned History Hub.

## County Historical Fund, ORS 358.171-230

ORS 358.171-230 creates a continuing tax levy to fund a county historical fund. Funds raised are divided amongst the County's historical resources and spent at their individual discretion subject to court approval. Historical societies located in the county provide a detailed estimate of the funds they require to the county court for approval. Funds are subject to disbursement by warrants drawn by the historical societies. In 2016, Coos County proposed a County Historical Fund through a \$.10 levy that would have raised \$500,000 for eight county historical societies and museums. The measure failed with 35% in favor and 65% opposed. While this funding source would provide the monetary support sought by the heritage organizations, it lacks the ability to support a staffed, service model like the History Hub.

## Local Option Property Tax Levy

Crook (1998), Klamath (2011), and Multnomah (2011) Counties have approved 5-year local option property tax levies to assist with heritage funding. In each of these Counties, voters approved the renewal of these levies. Multnomah County's levy primarily supports the Oregon Historical Society (OHS). Since the levy was enacted, OHS has seen increased visitation and memberships even though they offer free admission to in-County residents. A property tax levy that needs to be renewed lacks the continuity and stability needed to create and sustain the History Hub. It also requires periodic lobbying and campaign costs for renewal efforts.

## Transient Room/Lodging Tax- ORS 320.300-350; County Code Chapter 8.02

In 1992, Clackamas County voters approved a 6% county-wide Transient Room Tax (TRT) that is levied on overnight stays in commercial lodging properties including hotels, motels, bed & breakfasts, campgrounds, short term vacation rentals, and other related facilities. Clackamas



County's 1992 TRT ordinance stipulates that a set amount of TRT revenues (around \$500,000 for FY 19-20) are dedicated to support the Clackamas County Fair. Of the remaining revenue, 98% must be used for tourism promotion and development, with the remaining 2% to be used for tax administration.

In 2003, the Oregon Legislature passed a statewide Transient Lodging Tax of 1.0% on all lodging properties within the state. The Legislature also grandfathered in all existing local transient room taxes at their 2003 levels, as well as the percentage of distribution between tourism promotion and other general fund purposes. 70% of any new transient lodging taxes approved after 2003 must be used for tourism promotion and development, while up to 30% may be used for general fund purposes. Jurisdictions were also precluded from decreasing the amount of their TRT/TLT or altering the percentages that were established prior to 2003. In 2017, the state TLT was increased to 1.8%.

Per statute, TRT/TLT revenues can only be used for tourism-related purposes (with the exception noted above allowing up to 30% to be used for other general fund purposes). State law restricts TRT/TLT for operations to an incorporated nonprofit or governmental unit that is responsible for the tourism promotion of a destination on a year-round basis. "Tourism" is defined as an economic activity resulting from tourists, and a "tourist" is defined as a visitor that travels from the community that they are a resident of to a separate and distinct community that is more than 50 miles away or includes an overnight stay in a commercial lodging property.

Other jurisdictions may be able to fund non-tourism related activities or operations with local TRT/TLT revenues depending on local TRT/TLT laws in place in 2003, or any new tax passed after 2003. However, the History Hub would not be an allowable use of Clackamas County's TRT funds, since 98% of these funds must be used for tourism-related purposes only.

## General Fund Support

As noted in the FY 2019-2020 Budget Message, Clackamas County is in the process of reviewing expenses and right-sizing future budgets. County expenses are currently increasing at a rate of about 7%, outpacing revenue from property taxes, which has risen about 5%. An increased population of 10% in the last ten years has led to increased demand for County services and personnel services have exceeded prior estimates. Over the next year, the County will strategically reset priorities that reduce expenditures while resetting the course to achieve the goals for the future. Given these current challenges, and the fact that there are consistently more requests for General Fund support than can be accommodated, the County General Fund is not a viable source of the long-term, sustainable funding needed to support the History Hub.

## Additional Funding Sources

While insufficient for primary funding of the History Hub, the below funding sources could be considered to provide supplemental funding. The History Hub will encourage additional public support of its programs, activities, and projects wherever possible.

- **Grants**

The History Hub would focus grant efforts on opportunities that might not be available to smaller, individual organizations. It is expected that the History Hub will have the capacity to apply for and manage larger-scale or national grants (ex. Institute of Museum and Library Services (IMLS)). Grant funds would be used to support projects, programs, and collaborative exhibits.

- **Individual Donations (Includes Planned Giving and Corporate Match Programs)**

While it is conceivable that there may be donor interest in supporting multi-organizational programs and support that the History Hub would offer, it is much more likely that most donors will choose to give to individual organizations.

- **Sponsorships**

Sponsorship opportunities would be available at both the History Hub level and at the individual heritage organizations. The History Hub would solicit sponsorships for any History Hub websites, brochures, programs, exhibits, special events, etc.

- **Endowment**

Most non-profit organizations have adopted the IRS guidelines for private foundations that recommend a 5% payout. This requires the endowment to achieve a return of 5% plus rate of inflation to preserve funds for the future. In order to provide primary funding for the History Hub with a 5% payout while accounting for inflation, the principal required would likely be an amount in the tens of millions of dollars. It is unlikely that sufficiently large endowment could be secured, however, it is possible that (based on donor interest), smaller endowments could be established to fund specific staff positions or programs.

# Recommended Funding Source: County Heritage District, ORS 358.442-474

(See Appendix: *County District Levy Proposal*)

At this time, the only viable option to provide the predictable, permanent revenue needed to support the History Hub, as currently envisioned, is the creation of a County Heritage District under ORS 358.442 - 358.474. Creating a County Heritage District provides continued funding and long-term stability without the periodic extra expenses required to renew property tax levies. The County Heritage District also provides the flexibility to provide expertise in addition to funds to the heritage organizations that the fund-based County Historical Fund lacks. Since the powers of the heritage district board are broadly defined, the County Heritage District could assist with funding the Clackamas County Fair, an eligible County historic site and State designated heritage tradition.

## Oregon Heritage Districts<sup>1</sup>

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 district board shall appoint a representative of the museums in the district to serve as secretary of the district. Any elector residing within the district is qualified to serve as a board member.



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

<sup>1</sup> *National Survey of Heritage Funding and Incentive Program: Opportunities for Oregon*, Oregon Heritage Commission & Oregon Cultural Trust, [www.oregon.gov/oprd/HCD/FINASST/docs/2017NationalHeritageFundingReport.pdf](http://www.oregon.gov/oprd/HCD/FINASST/docs/2017NationalHeritageFundingReport.pdf). The report was provided in full in the May 15, 2019 Heritage Project report.

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 .0025 of the real market value of all taxable property within the district.<sup>2</sup> 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.

While a Heritage District has not yet been formed in Oregon, three Oregon counties (Multnomah, Klamath, and Crook), do support their heritage organizations with five-year property tax levies. Unlike the proposed History Hub, most of these levies support one primary organization within the county. Multnomah County is the exception, as it provides a small amount of funding to four east County heritage organizations in addition to the Oregon Historical Society. As these levies have come up for renewal, voters have approved their renewal at increasingly favorable rates. Crook County initially approved a levy in 1998 and electors have since voted to renew the levy five times. Klamath County approved a levy in 2011 and renewed twice. Multnomah County initially approved their levy in 2011 and renewed in 2016.

	Year	For	Against
<b>Crook County</b>	2002	67%	30%
	2006	72%	26%
	2010	81%	19%
	2014	83%	17%
	2018	83%	17%
<b>Klamath County</b>	<b>Year</b>	<b>For</b>	<b>Against</b>
	2011	61%	39%
	2014	63%	37%
<b>Multnomah County</b>	<b>Year</b>	<b>For</b>	<b>Against</b>
	2011	54%	46%
	2016	69%	31%

A County Heritage District has been tried unsuccessfully once in November 2016 in Jackson County. This was the latest in several failed attempts to secure funding for the heritage organizations in Jackson County.

<sup>2</sup> One-fourth of one percent (.0025) of the real market value of all taxable property within Clackamas County for 2018-2019 (\$76,424,245,611) would be \$191,060,614.03. "Assessment & Tax Roll Summaries." *Clackamas County*, [www.clackamas.us/at/previous.html](http://www.clackamas.us/at/previous.html).

## Partnership with the Clackamas County Fair

The Clackamas County Fair faces similar sustainability issues and is in the process of exploring alternate funding mechanisms. Since the Clackamas County Fair is an Oregon State recognized heritage tradition with historic buildings, there may be the opportunity to utilize the County Heritage District to pass through funds to help support the Clackamas County Fair. The County Fair could join the heritage organizations in pursuing a County Heritage District that would provide support for both the History Hub and the Fair. A joint ballot measure would clearly designate the percentage of funds dedicated for the History Hub and to the County Fair. The existing County Fair Board would have control over any fair-designated funds.

# Proposed Operations

Should the electors of Clackamas County approve a County Heritage District, the elected District Board would determine the final details of the History Hub. Based on our work and discussions with stakeholders, we have developed the following possible staffing and operations scenarios.

The following estimates are based on 2018-2019 assessed property values, and assume that the County Heritage District boundaries would include all of Clackamas County. In order to fund the History Hub as outlined, staff recommends a property tax rate of at least \$.05 per \$1,000 of assessed property value.

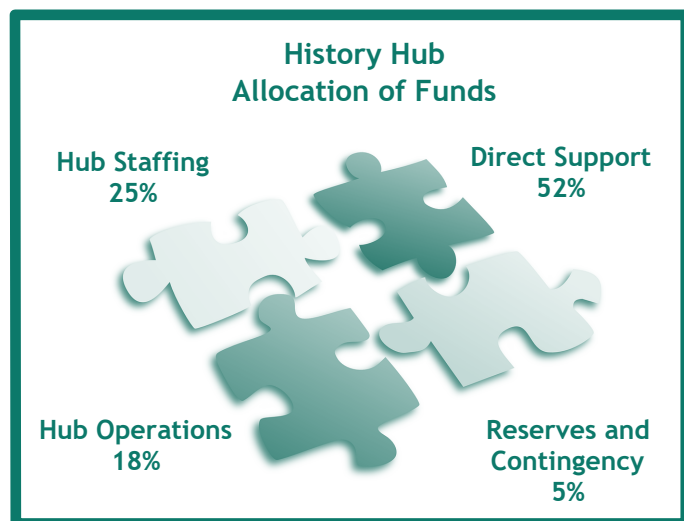
	Tax Rate \$.05	Tax Rate \$.07	Tax Rate \$.10
Assessed Value (2018-2019) <sup>3</sup>	\$50,837,608,911	\$50,837,608,911	\$50,837,608,911
Proposed Tax Rate	\$.05	\$.07	\$.10
Estimated Total	\$2,541,880	\$3,558,633	\$5,083,761
Total Assuming 95% Collection Rate	\$2,414,786	\$3,380,701	\$4,829,573
Average Assessed Value	\$292,136	\$292,136	\$292,136
Yearly Cost for Average Household	\$14.61	\$20.45	\$29.21

## Potential Division of Funds

Once formed, the County Heritage District Board would have the authority to allocate funds consistent with the ballot measure.

Should the County Fair be included in a Heritage District ballot measure, the County Fair Board would have sole discretion as to the use of any funds dedicated to the Fair. County Fair funds would come immediately “off the top” and would be separate from funds allocated by the History Hub.

Based on our work to date, including analysis of the heritage organizations’ internal needs, one possible



<sup>3</sup> “Assessment & Tax Roll Summaries.” *Clackamas County*, [www.clackamas.us/at/previous.html](http://www.clackamas.us/at/previous.html).

allocation scenario would have funds raised through the County Heritage District for the History Hub spent in four main categories:

## Direct Support

In-District heritage organizations would receive funds through a mixture of stipends and grants depending on their organizational type. Stipends may be available to assist with front door staffing and overhead expense. Grants may be available for matching funds or other projects that promote the goals of the History Hub. In both cases, there would likely be an application process or requirements to meet in order to receive funds.

Direct funding for heritage organizations could include:

- Promoting collaboration through grants for cross organization programs and exhibits
- Increasing visitor-readiness by assisting in funding front-door staff
- Supporting heritage grant efforts by providing matching grant funds and grant writing assistance

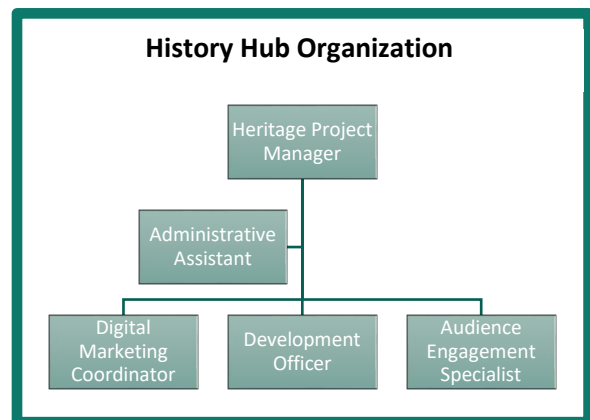
Additional items, such as the creation of a revolving fund for history preservation, may be considered.

## History Hub Staff and Operations

The staffing model is based on hiring full time staff with at least mid-level professional experience in their respective field. Staffing would be supplemented with volunteers and interns. Depending on the level of competency of the participating sites, work may range from advisory (for those sites with staff and technology skills) to actual implementation on behalf of the site (for the small, volunteer-run organizations). Actual staff positions may vary once the County Heritage District is implemented.

### Core Services

The History Hub would provide staffing resources to assist heritage organizations in their areas of greatest need as identified in the Heritage Organization Survey. The focus areas include marketing, technology, audience engagement, and development/fundraising. Services at this level would be fulfilled and coordinated by History Hub staff. Staffing costs were estimated based on equivalent County classification specifications, associated salaries, and estimated benefits. The History Hub is currently envisioned to include the following staff positions



Heritage Project Manager (Mid-point salary and benefits: \$166,383)

- Work with the Board to develop strategic priorities & budget for the History Hub.
- Provide direction for the Hub in line with strategic priorities and budget.
- Provide status reports to the Board.
- Facilitate coordination between organizations and allied partners.
- Oversee History Hub staff and operations.

Digital Marketing Coordinator (Mid-point salary and benefits: \$129,559)

- Explore, recommend, and implement new digital marketing opportunities with an eye toward building audiences. The Coordinator's primary goals include helping increase attendance/admissions, strengthening brand awareness and loyalty, and assisting in unifying and clarifying organizational messaging.
- Work with member organizations to develop marketing content across platforms (print, digital, social media).
- Manage social media platforms for member organizations.
- Primary marketing target area of <50 miles radius.
- Coordinates with Clackamas County Tourism for marketing reach beyond 50 miles.

Development Officer (Mid-point salary and benefits: \$120,076)

- Grant writing for History Hub activities/programs and for participating members.
- Develop & manage sponsorship and corporate giving programs across organizations.
- Work with member organizations to develop membership programs, special events, and facility rentals with the goal of developing earned income opportunities at each heritage organization.
- Develop & manage a historic preservation program.

Audience Engagement Specialist (Mid-point salary and benefits: \$115,730)

- Assist member organizations in developing onsite and offsite public educational programs.
- Work with Digital Marketing Coordinator to implement educational programs via social media / online platforms.
- Working with Clackamas County Tourism, develop visitor readiness standards and assist member organizations in achieving those goals.
- Coordinate volunteer program (volunteers, docents, interns) for Hub activities and across member organizations. Includes creating a volunteer manual, public outreach to recruit volunteers, and coordinating volunteer recognition program.

Administrative Support (Mid-point salary and benefits: \$87,420)

- Schedule meetings and coordinate workshops.
- Coordinate board meetings, minutes, public notices, etc.
- General office support.
- Assist with newsletter, journal, and blog content.



## **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. Oregon Heritage's 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

- Assist member organizations with board development and strategic planning.
- Provide access to current scholarship and training opportunities through staff development grants, access to professional organizations, and reference library.
- Coordinate opportunities to leverage purchasing power of heritage organizations. (Ex. purchasing merchandise or supplies.)

## Curatorial (Museum Collections & Exhibitions)

- Assist member organizations with collection and exhibition planning.
- Offer shared collections management software.
- Coordinate public exhibits and programs that bring the heritage organizations to the community / schools.
- Depending on the needs/interests of participating organizations, explore a shared collections storage space.

## Historic Preservation

- Support Heritage Review Boards through grants, programming, and staff development.
  - Provide funding for special projects such as updating Historic Building Inventories.
  - Support outreach and educational efforts.
  - Offer grants to assist with Historic Review Board or staff training.
- Create a revolving fund to support historic preservation efforts. This could take the shape of a loan fund to aid economically disadvantaged residents, a conservation easement fund, or a traditional revolving fund to rescue at-risk historic structures.
- Coordinate periodic building assessments of historic structures managed by heritage organizations

## History Award Program

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

## **Reserves and Contingency**

The Hub will establish reserves and contingencies to address unexpected expenditures, maintaining necessary operating cash flow, and to fund the construction and repair/replacement of District-wide capital assets (such as a shared, central collection storage facility).

# Implementing a County Heritage District

## Scope of Work

Additional work would be required to evaluate public support for a District and coordinate efforts to prepare a future ballot measure for voter approval. Work would include, but not be limited to, the following:

### Preparatory Work (Approximately 12 months prior to election)

- **Targeted Outreach to Heritage Stakeholders**  
Create presentation materials and handouts to be used in meetings with key people and/or groups involved in historic and heritage work within the County. Inform, gain support and add people to the team to share the information with the larger community and advocate for the district.
- **General Community Outreach**  
This includes outreach to those that would both benefit from and pay for the County Heritage District to inform and gain support. Work would include outreach to CPOs and Hamlets, and business organizations; social media; website; articles in city and county newsletters; online information (perhaps interactive); tabling at community events with handouts, signs and banners; information available at appropriate locations (museums, heritage sites, parks, etc.)
- **Assess General Support for a County Heritage District**  
Determine if there appears to be sufficient support for a County Heritage District to be approved by voters, and identify issues/questions/concerns that could be addressed to increase the level of support. The best way to assess support would be to conduct a scientific, random-sample telephone survey. This could be combined with seeking input informally online and through the outreach referred to above.
- **Draft Ballot Measure**  
Legal staff to draft measure title and text. Obtain approval of the ballot measure language at the State level.
- **City Resolutions**  
Cities within the district would be asked to pass resolutions to be included within the County Heritage District.

### Measure Placed on the Ballot (Approximately 3 months prior to election)

Following the placement of the measure on the ballot, the informational and advocacy campaigns would continue outreach efforts until the election.

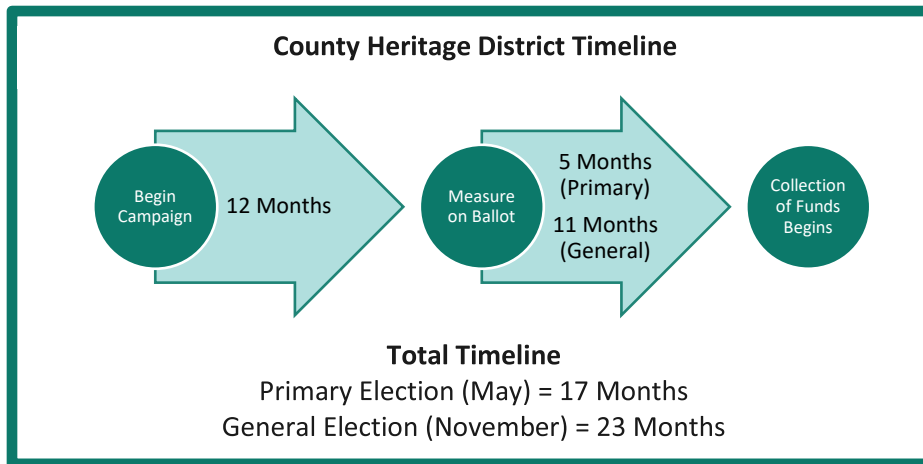
## Cost

Depending on the timing for the election, the cost for an informational campaign could range considerably depending on how much work is done in-house by staff and how much would be done by a contractor. An informational campaign would cost \$10,000+ with a survey in addition to staff and legal time. In May 2018, the Clackamas County Heritage Council contacted Prospect,

a communications-marketing firm, to explore a marketing campaign. At that time, Prospect recommended a timeline of one year and a budget of \$75,000-\$100,000 depending on the results from a public poll. As part of that estimate, Prospect provided an initial startup budget of \$25,000 for information gathering, polling, and referral assistance.

## Timeline

A campaign would likely require at least 12 months of work prior to appearing on the ballot. After successful passage, it would be 5 months, in the case of a primary election, or 11 months, in the case of a general election, before funds begin to be collected.



# Appendices

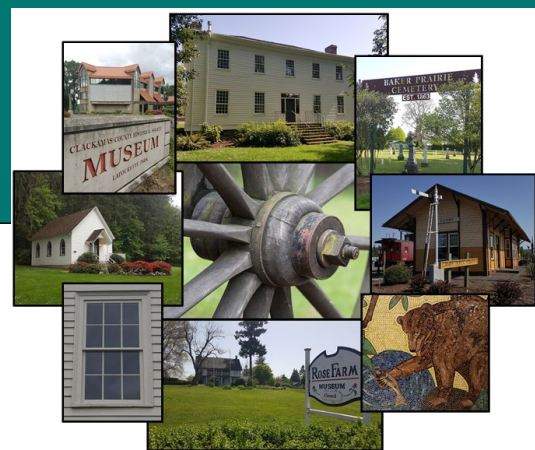
Clackamas County History Hub Concept Fact Sheet - *Revised*

# CLACKAMAS COUNTY HISTORY HUB CONCEPT

## SUSTAINABILITY, GROWTH & COLLABORATION

### WHAT IS THE CLACKAMAS COUNTY HISTORY HUB?

The History Hub would provide member organizations with common core services. Funding would be consolidated and professional staff hired in key roles that would share their services with participating organizations. A level of expertise would be provided that the individual sites currently cannot afford, significantly increasing organizations' capacity to reach emerging audiences.



### WHAT ARE THE GOALS OF THE HISTORY HUB?

- Build a collaborative organization to preserve and promote the County's rich history.
- Improve the financial stability of 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, but are not limited to, 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 to help organizations develop programs and exhibits that appeal to a diverse audience.

### WHAT SERVICES WOULD BE PROVIDED?

**Core Services:** Fulfilled by Clackamas County History Hub staff.

The History Hub would provide staffing resources to assist heritage organizations in their areas of greatest need as identified in the Heritage Organization Survey.

#### **Marketing & Technology**

- Explore, recommend, and implement new digital marketing opportunities with an eye toward building audiences. Primary goals include helping increase attendance/admissions, strengthening brand awareness and loyalty, and assisting in unifying and clarifying organizational messaging.
- Work with member organizations to develop marketing content across platforms (print, digital, social media).
- Consolidate local (<50 mile radius) marketing efforts.

#### **Development (Fundraising)**

- Grant writing for History Hub activities/programs and for participating members.
- Develop & manage sponsorship and corporate giving programs across organizations.
- Work with member organizations to develop membership programs, special events, and facility rentals with the goal of developing earned income opportunities at each heritage organization.
- Develop & manage a historic preservation program.

#### **Audience Engagement:**

- Assist member organizations in developing onsite and offsite public educational programs.
- Working with Clackamas County Tourism, develop visitor readiness standards and assist member organizations in achieving those goals.
- Coordinate volunteer program (volunteers, docents, interns) for Hub activities and across member organizations. Includes creating a volunteer manual, public outreach to recruit volunteers, and coordinating volunteer recognition program.

## WHAT SERVICES WOULD BE PROVIDED (CONTINUED)?

**Secondary Services:** Fulfilled through mentorship programs and coordinating outside service providers.

### Operations:

- Assist member organizations with board development and strategic planning.
- Provide access to current scholarship and training opportunities through staff development grants, access to professional organizations, and reference library.
- Coordinate opportunities to leverage purchasing power of heritage organizations. (Ex. purchasing merchandise or supplies.)

### Curatorial

- Assist member organizations with collection and exhibition planning.
- Offer shared collections management software.
- Coordinate public exhibits and programs that bring the heritage organizations to the community / schools.
- Depending on the needs/interests of participating organizations, explore a shared collections storage space.

### Historic Preservation

- Support Heritage Review Boards through grants, programming, and staff development support.
- Coordinate periodic building assessments of historic structures managed by heritage organizations
- Create a revolving fund to support historic preservation efforts. History Award Program
- Promote and recognize service and restoration efforts by individuals, businesses and other organizations.

## WHAT ARE THE BENEFITS FOR PARTICIPANTS?

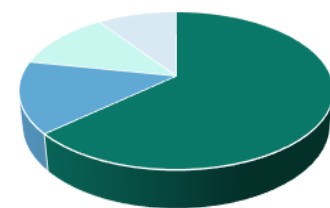
Organization Type	Benefits
All Heritage Organizations	<ul style="list-style-type: none"> <li>• Grant Based on Operational Budget</li> <li>• Grants for Special Projects &amp; Operations</li> <li>• Access to History Hub</li> <li>• Heritage Preservation Awards</li> </ul>
Sites & Museums	<ul style="list-style-type: none"> <li>• Funding Assistance for Front Door Staff &amp; Overhead Expenses</li> </ul>

## WHAT ARE THE REQUIREMENTS OF PARTICIPANTS?

- Provide discounted admission and programs fees for in-district residents.
- Complete/Update a Heritage Assessment Survey annually.
- Track & report performance metrics.
- Commit to a minimum standard hours open to the public .
- Commit to one newsletter/blog article per year.
- Maintain active membership in the Clackamas County Heritage Council by attending 75% of CCHC meetings annually (either in person or via phone).
- Appoint a History Hub staff member as a non-voting, ex-officio member of organization’s board.

## WHO IS ELIGIBLE TO PARTICIPATE?

- A Nonprofit organization or local government operating within Clackamas County or a tribal government with homelands within the current boundaries of Clackamas County.
- Actively engaged in historical interpretation or preservation efforts pertaining to Clackamas County history.



- 26 Museums & Historic Sites
- 6 Historical Societies & Interpretive Organizations
- 5 Historic Review Boards
- 4 Archive Genealogy Organizations