

Heritage Vitality Task Force

9 a.m. June 18, 2012

Oregon State Library, Room 102

250 Winter St. NE

Salem, Oregon

DRAFT NOTES

Appointees: Rep. Bill Kennemer, Jan Mitchell, Oregon Heritage Commission. Roger Roper, State Historic Preservation Office. Kerry Tymchuk, Oregon Historical Society. Walter Frankel, Oregon Cultural Trust. Jackie Edmunds-Manz, Oregon Tourism Commission. Frankie Bell, non-profit organization. Janet Taylor, public. Terrie Martin, public.

Advisors: Bob Hart, Oregon Museums Association; Gary Williams, League of Oregon Cities; David Lewis, cultural resources director of Confederated Tribes of the Grand Ronde; Cara Fischer, Association of Oregon Counties.

Staff: Kyle Jansson, Cara Kaser, Tracy Zeller

Public: Layne Sawyer, Oregon State Archives; Glenn Harrison, Linn County; Cody Hull, Benton County.

Representative Kennemer called the meeting together at 9:05 a.m.

1. **Introductions**

Everyone in the room introduced themselves. Jansson said the Governor's office has not completed appointments and so he made sure that all of organizations mentioned in HB 3210 had advisors at the meeting.

2. **Welcome by Legislators**

Representative Kennemer welcomed everyone, and talked about the importance of heritage to his life and to the state.

3. **Review Six Purposes of Task Force**

Jansson reviewed the six purposes of the Task Force as contained in HB 3210 as he described them in the draft work plan given to members. Lewis asked how tribal representatives fit into the subgroups that would look at the six issues. Jansson said they can choose which subgroup they want to work with.

Roper suggested using three subgroups instead of six. Kennemer said this was an excellent suggestion, but he would like to wait to discuss it until after the Task Force leadership has been elected.

4. Review Timeline for Task Force

Jansson reviewed the proposed schedule of 3-4 Task Force meetings with subgroups carrying out much of the work.

5. Selection of Chair and Vice Chair

Taylor nominated Tymchuk as Task Force chair. Mitchell seconded. Approved unanimously. Tymchuk took over chairing meeting.

Williams said that once a tribal member is appointed by the governor, that person should be elected as the vice-chair. Tymchuk nominated Taylor as a vice chair. Williams and Edmunds-Manz seconded. Approved unanimously.

6. Approval of Agenda

7. What is Heritage?

Jansson reviewed statutory definitions for “heritage” and “cultural heritage.” Members discussed their perspectives of heritage. Mitchell and Edmunds-Manz said they believe that a sense of place is very important for heritage. Edmunds-Manz offered to put together some information regarding this for one of the sub-group meetings.

Lewis says heritage is many things such as tourism and business, and education is an important piece. Tymchuk said heritage is a bit like former Supreme Court Justice Potter Stewart’s oft-quoted definition of pornography: “I know it when I see it.”

Kenemer said he is concerned that many people/places are only interested in banishing heritage education etc. The task force has a huge challenge to train people to respect and understand a sense of heritage, and bring Oregon heritage back into mainstream.

Bell says the Task Force can take advantage of the deep heritage that Oregon has.

8. Why should people care about heritage?

Williams said a number of Oregon cities such as Independence, Cottage Grove and Pendleton have figured out how to capitalize on what they have, whereas other cities have not. Other places need to consider how to capitalize on their heritage and shake the money trees.. He said he likes the use of QR codes and linked websites.

Bell said the Oregon Capital Foundation has chosen the name of the Capitol Gateway for the capitol’s history center.

Taylor said that she cares about heritage because no matter what it is, once it’s lost, it is almost impossible to get it back.

Roper said we do not have to reinvent a lot of things. It is more about shining a spotlight on what is still there and showcasing the good things that have already been done.

Edmunds-Manz agrees and says we should look at who is doing it and being successful, as well as looking at those who have not succeeded and determine how they can be helped.

Martin feels there has to be a bridge to fill the gap between how older generations access heritage and how younger generations access it through technology. There is also a gap between high school and becoming parents when people become disconnected with their heritage. Kaser agrees this is something that should be looked at by this task force, however the task force should encourage people to actually come see museums etc, but in the same sense, let go of historical authority and “give in” to modern technology.

9. Oregon Overview Today:

Jansson reviewed history and current status of Oregon Heritage Programs, Oregon Historical Society, city and county historical societies and museums, immediate origins of the heritage organization crisis, and the origin of the Task Force. His notes are attached to these notes. Comments made by Task Force members during the presentation included:

Tymchuk said the recommendations ought to be a blend of idealism and realism. They also ought not write business plans, rather create an atmosphere for heritage to support people and communities to prosper.

Break

Lewis said there is a need for local history groups. If they weren't there already, someone would form one. Edmunds-Manz said there is a public perception that cities and counties fund heritage organizations. Perhaps we need to talk up the nonprofit nature of these organizations.

Kenemer said the state's fiscal picture may be slightly better in the next biennium. There are many needs to be met, some more compelling. Funding for local historical societies would be a tough sell.

Taylor said many historical organizations are economic engines for their communities, citing a Travel Salem study.

Lewis said heritage efforts involve culture and education as well, and can be connected to social service efforts.

Hart noted that at the Seminar for Historical Administration last fall, there were five key themes taught: Be bold. Loss of authority. Invest in partnerships. Get used to the new normal. Be quick to re-invent yourselves.

10. Review Work Plan – All

Tymchuk noted the six areas of concern identified in HB 3210 for the Task Force to consider. Using those six, he asked for suggestions to improve the funding of each.

Task A – Review Oregon systems for providing public funds to the Oregon Historical Society, county historical societies and museums and other Oregon heritage organizations.

1. Reauthorization of the Oregon Cultural Trust tax credit. Sales of surplus state land have not happened as initially planned 10 years ago.
2. Local increases in room tax at hotels
3. Driver's license surcharge
4. designated lottery dollars taxes

Task B – Review county historical fund operations and the effectiveness of county historical funds in promoting historical museums, history education, heritage tourism, historic preservation and related economic development.

Re-examine Heritage District legislation. Compression may be an issue in some jurisdictions.

Task C -- Review city museum operations and the effectiveness of city museums in promoting historical museums, history education, heritage tourism, historic preservation and related economic development city museum operations

Re-examine Heritage District legislation. Compression may be an issue in some jurisdictions

Local increases in hotel/motel taxes

Task D -- Study and assess amounts of private moneys supporting county historical fund operations and city museum operations and recommend programs or changes to expand private support of those operations

Review and improve business recruitment efforts in communities by showing the importance of heritage.

Re-enact tax credit for Oregon Cultural Trust. Heritage community is a weak link for supporting the cultural trust.

Strengthen mindset of the heritage community to take advantage of Cultural Trust and Main Street programs and other partnerships.

Training for local heritage leaders on how to raise private funds.

Make the general public more aware of the need for funding.

Figure out a way to make more people more interested and excited about Oregon heritage

Task E -- Evaluate statutory law relating to county historical funds and city museums, as codified in ORS Chapter 358, and the related administrative rules adopted by state agencies.

Have the AOC and LOC take a look at these as it has not been done in many years.

Task F -- Study, assess and recommend programs and projects, including pilot projects, to encourage coordinated efforts at the state, county and city levels to improve heritage tourism, history education and historic preservation and related economic development.

Collect success stories, including those from other states, to find out why they were successful.

Find ways to brand an Oregon heritage narrative.

Find successes such as taxing districts (a la Cottage Grove), Main Street programs and others where communities are developing their vision.

Communicate to inspire and education.

11. Establish Working Groups -- All

By consensus, the Task Force created three working groups to look at the tasks: public funding, private funding and best practices. Another subgroup will look at the statutory elements. Appointees and advisors will be asked which working groups they want to serve on.

12. Research needs -- All

Data

Interviews by Task Force members

13. Heritage Success Stories in Oregon:

Jansson showed images from a dozen organizations and communities in Oregon that have been exceptionally successful in their activities during the past few years. These included the Bowman Museum and Crook County Historical Society, Prineville; Klamath County Museum; World War II Signs on Highway 97; Lane County Historical Society, Astoria, Cape Blanco Heritage Society, Oregon Jewish Museum, Century of Action, Southern Oregon Historical Society, Oregon Digital Newspaper Project, Luper Cemetery.

14. Future Meetings:

By consensus, the Task Force set its meetings for Aug. 13, Sept. 10 and Sept. 24 (if necessary).

--Notes compiled by Jansson.

Prepared notes for Kyle Jansson talk, opening meeting of Legislative Task Force on Heritage Vitality in Oregon

Oregon as an admired state for its cooperation. My experience at AASLH last fall. People will look at whatever this Task Force recommends and others ultimately implement.

The old model is broken. This is your chance to Dream big. Create a new business model. Create new ways for these organizations to show their value to their communities. Think about how the Legislature might help solve these issues. Think about how state and local governments, and professional groups could help solve these issues.

There are specific tasks in House Bill 3210 for the Task Force to complete, so you will be only looking at these problems. But look far and wide for your solutions.

My goal in my talk is to share with you some general history of heritage in the 20th and 21st centuries in Oregon. I have facts, observations, and theories to share with you. They are meant to challenge your perspectives and prod you into thinking at heritage in new ways. I don't have the answers to these issues. I look forward to working with you to find them.

But first, some operational basics.

Oregon Heritage – division of OPRD

- Broader scope – archaeology, building preservation

- Annual conference

- State historic preservation office, with CLG, Section 106 programs (federal)

- Grants

- Supporting organizations, including governments, nonprofits

Oregon Historical Society -- nonprofit

- History.

- Exhibits.

- Education, including quarterly scholarly.

- Preservation of collections.

- Events for general public.

Counties and cities

First in late 19th century – Hood River County? Many early historical societies nationally wanted to help people in the present (often veterans) appreciate the work of others who had made their community great (pioneers), and to document their lives for the future. Is that the same today?

First big spurt in Oregon – post World War II, a sense of a free country that had just won a war. Also, the state centennial (Marion County an example).

In other parts of the country, counties and the state provided significant funding. Often a dream of 1/3 membership, 1/3 admissions and earned income, and 1/3 (or more) government funding. Some were nonprofits and some government operated. Voters in some counties (Jackson) approved tax measures to support historical societies.

This late 1940s spurt led to first state laws in 1953 for county historical funds. Slow increase also led to city museum statute sometime prior to 1965.

Another spurt during and following restoration of 1980s and 1990s as tribes reclaimed their heritage.

Specialized historical societies – sports, printing, airplanes, ethnic, Oregon Trail.

Cities and counties Today

Over 200 local heritage organizations.

Tualatin provides THS a subsidy for a staff member. Wallowa County owns the building and provides a \$1,000. Some like Clatsop County have a small professional staff and hundreds of members.

All rely heavily on volunteers. Many small, budget median is \$30,000. Others larger with budgets of several hundred thousand dollars. Probably a third run in the red on an annual basis. Not always the same ones.

Sometimes, more than one in a community. Only cultural tourism attractions in their areas, and 75 percent of tourists are looking for a cultural place or activity.

Origins of the Crisis

Coming for Years. Many of these were started by well-meaning individuals and well-meaning governments. Use Marion County as a well-meaning example. Holman Building about 1950. Failure led to historical society to preserve buildings. Then maybe its own museum so it started collecting. Then it wanted to save Mission Mill. No thinking about long-term or sustainability

Not until recently have all areas of these buildings been open for public viewing and budget balancing, even with city support, is tough.

In other communities, people tried to save house for museum. City says we'll buy if you maintain. Group maintains for a number of years. Members age. Can't maintain, so city agrees to hire curator. With budget cutbacks, no one can maintain. Does every city need a house museum? Would anyone care if these house museums weren't there? How can cities and counties that have museums or historic houses turn these costs into assets?

Since the 1980s, developments have been both positive and negative.

1994 – Legislative Task Force to address coordination.

1998 – Adoption of Measures 47/50

2002 – Cultural Trust

2003 – Legislature for first time in a century does not provide funding to the Oregon Historical Society.

2007 – Heritage District

2011 – Multnomah County voters said that for the next few years they would provide funding for OHS.

May 2012 -- Secretary of State's financial condition review of counties. Eight to be monitored.

July 2012 -- Lane County will have a \$100 million reduction in budget from previous year, forcing big cutbacks in a number of key county services, including law enforcement, elections and assessment and taxation. Laying off more than 200 workers and closing 131 jail beds. Cities also in crisis mode.

Broader issues

Many factors in Vitality Report. I think there are others that are difficult to measure

1. Fareed Zakaria in his book The Post-American World raises an interesting question. He's writing about how relations between countries and regions will change during the next century. He believes that modernization brings change to everyone. Old hierarchies of age, ideology, and business are changing. The world is becoming a melting pot. "Every culture has its distinct elements, and some of them survive modernization. Others don't." Are historical societies as they are presently operating able to survive modernization?

2. People in rural communities often leave their towns because they can't find jobs. History to some of them is that historical house museum where people care about the things of the past, not about the younger people of the present who are struggling to survive. When these people leave and go to a new community, they may not want to learn about the long-ago past; they want to learn the more recent past so they can be successful.

3. Historical societies and museums amassed hundreds of thousands of items that need preservation. Most are ill-prepared for disasters. (Compare with PERS.) Mention C2C efforts and the application for a federal IMLS grant.

4. National issues such as:

a. Federal forest dollars in the federal budget.

b. Museums generally 2011 – More than 70 percent of AAM member museums reported economic stress. Forty percent experienced a decline in total revenues. 28 percent froze hiring and 13 percent laid off some staff. This isn't new – in good years in Oregon, one-third of its museums operate in the red.

Positive – AAM survey said 53 percent of museums had increased attendance.

Origin of the Task Force -- 2009

Fewer museum staff than when I started in 1995.

Summer 2009 – Prineville meeting. We were at the edge of failure.

End of Oregon Trail in Oregon City closed. SOHS closed. OHS lessening service and staff, at a time when many local historical societies have OHS as last resort for their collections. A sense of desperation. Something had to be done.

During next year, research for Vitality Report done with surveys and roundups around the country. Stats gathered. **Commission asked Legislature to be a part of the solution, and that's how this Task Force came about**

So what's the Solution?

I don't know and I haven't heard anyone say any one thing that does.

Other communities:

Establishment of a community preservation fund in Fall River, Mass.
Community encounters (SOHS)

Libraries of Eastern Oregon. Funded by public libraries in 16 counties and three foundations, dramatically increased use of downloadable audio books, ebooks and video, and educational resources with services available 24/7.

A company in Bend this spring unveiled a new offering: American motorcycle holidays that invoke the culture of the wild west. Fly in. Stay nice hotel. Six-to- eight hour ride everyday. Starting at just under \$5,000 a week.

Final Closure:

Dream big. We are being looked at from other states because we're even able to have this Task Force with a variety of heritage interests who often don't get a chance to talk with each other, and come to conclusions.

Abundant thinking vs. thinking of scarcity

Governor's 10-year-plan

Be involved for the next three months.

Pay attention to details

Ask Cara and I questions for information.

Legislative Task Force on Heritage Vitality in Oregon

August 13, 2012

Meeting Notes

Task Force Appointees Attending: Frankie Bell, Jan Mitchell, Jackie Edmunds-Manz, Kerry Tymchuk, Walter Frankel, Janet Taylor, Roger Roper.

Task Force Advisors Attending: David Lewis, Gary Williams, Bob Hart,

Staff: Kyle Jansson, Cara Kaser.

Public: Kuri Gill, Oregon Commission on Historic Cemeteries; Layne Sawyer, Oregon State Archives; Annie Donnelly, Coos Historical & Maritime Museum; Peter Booth, Willamette Heritage Center; Jan Nordlund, legislative committee staff; Susan Spitzer, Oregon Maritime Museum; Christine D'Arcy, Oregon Cultural Trust.

Tymchuk called meeting to order at 10:33 a.m.

Public Comments: Gill summarized the cemeteries commission's comments that were previously submitted in writing. The commission is happy the Task Force was created and it is leading an important process. There is always a need for public support of heritage, but the public also needs to be reminded of the value of heritage. Strong healthy organizations make heritage work, and the work can be done by staff and volunteers using professional standards and engaging the public. Encouraging training and providing technical support are two important state roles. Oregon Heritage is providing training and technical support, but it needs to be enhanced. Another state role is better coordination, among themselves and locally.

Sawyer commented upon public funding recommendation four. She said this could be changed and modeled upon HB 2092 from 2009. That would have instituted a fee, but only half would the proceeds would go to the state. The other half would be retained by counties and cities. She noted that bill had strong pushback. Archives would support this recommendation if it contained counties being able to retain funds. In response to a question about partnering with Ancestry.com, Sawyer said government can't charge people to look at public records. Hart said the pushback on the 2009 fee legislation was almost hypocritical because the fee would actually enable those opposing it to perpetually have the records that enable them to conduct business.

Donnelly talked about the re-direction of the Coos Historical Society of the past decade and putting together an almost completed \$8 million campaign for a new museum building. It has never been supported with county funds. Demographics have changed: more than 25 percent of the population has been there less than 10 years. This has increased interest in local history, and the uncertain economic future has encouraged others to re-examine the past to understand why the community is where it is headed.

Transformation began 10 years ago with decision to engage the community, first through education. New museum is outgrowth of that. Diverse funding sources, mostly private. Campaign boosted by stats for Coos County that 27 percent of tourist spending on lodging, 17 percent on food and beverage, and 17 percent on cultural activity. She recommended educating the public of the economic, social and civic engagement benefits of heritage. Also, for many heritage organizations, engaging technology is problematic unless they can turn it into a profit center. Third, create a program similar to that used by nonprofit watershed councils. Groups would be regularly monitored and funded only if they show progress. This gives motivation to these groups.

Booth said that for heritage to be a sustainable resource it needs to be a public-private partnership. He also likes the idea of heritage areas, where everyone with a community is marketed through a regional approach. This builds a platform on which smaller groups can participate. Heritage groups also need to reach to those working on community development and other large-scale community-driven initiatives. Roper said a state heritage areas program is being developed.

Spitzer talked about the challenges of the Portland-based Oregon Maritime Museum. She recommended the establishment of a statewide maritime museum trail featuring the 12 maritime museums. Also, together, these museums could adopt a common technology to show off their story that could also appeal to the sponsorship of major corporations.

Research Update: Jansson said efforts to get information from cities and counties and their use of ORS 358 are ongoing.

Hart reported that the Lane County Historical Society and Museum learned recently of an unexpected cut in county support offered through transient occupancy tax revenues. The funds will instead be used for parks. Taylor said this use of TOT money for parks, which may not benefit tourism, also happened in Salem and underscores the need of heritage organizations to promote their economic impact.

Discussion of Draft Recommendations: Tymchuk led the committee through a discussion of each of the recommendations. Some will stay the same. Others will be re-written, even if conforming to a particular format. Following these Task Force comments, staff will work on revising the recommendations and drafting the rest of the report. The draft will be completed about Labor Day, so the Task Force can review them before its Sept. 10 meeting.

Meeting adjourned at 12:44 p.m.

--Notes compiled by Jansson.

Legislative Task Force on Heritage Vitality in Oregon

September 10, 2012

Meeting Notes

Task Force Appointees Attending: Frankie Bell, Jan Mitchell, Jackie Edmunds-Manz, Kerry Tymchuk, Walter Frankel, Janet Taylor, Rep. Bill Kennemer, Terrie Martin,

Task Force Advisors Attending: David Lewis, Gary Williams, Bob Hart,

Staff: Kyle Jansson, Cara Kaser.

Public: Kuri Gill, Oregon Commission on Historic Cemeteries; Layne Sawyer, Oregon State Archives; MJ Koreiva, Umpqua Lighthouse.

Tymchuk called meeting to order at 10:30 a.m.

Jansson briefly reviewed the city and county survey results, and other research.

Tymchuk led a discussion of the draft report findings.

Frankel suggested including additional description of other heritage organizations in the report. Lewis said he had additional demographic information about immigration into Oregon to include that related to both public education and community education.

Taylor said more needs to be done to strengthen the nonprofit history organization to make them relevant to community life, including the newcomers. Several said involving newcomers was important to their communities and to Oregon.

Taylor said she'd like to see all 800 organizations get fired up about the state's history and culture. Maybe there ought to be a year summit and people getting fired up in the media. Even a three-hour gathering to get people fired up about contacting their legislator, attending hearings, and changing the mood about history and heritage.

Frankel said that is something the Cultural Advocacy Coalition could do and they will need people in all parts of the state. Kennemer said if heritage advocates came to the Legislature during session they could make a difference.

Mitchell said museum people in her area often don't get involved in political efforts and it's hard to get people to travel anymore. Others said it's hard for small organizations to free up time for volunteers to participate

Several suggested Skype or an OPB simulcast to create the interest in approaching Salem. Martin said university students often join together through bus travel. All agreed that numbers are important.

Task Force members then reviewed and edited the draft recommendations. Tymchuk, Taylor and Jansson will piece them together and send to Task Force members next week for review before the Sept. 24 meeting.

Jansson reviewed the basic requirements for submitting the report and said it would be completed before Sept. 28. (The legislative deadline is Oct. 1.) Task Force members also discussed how to personally present it to legislators before the Task Force membership officially ends in February. They also said they would like to make certain that heritage organizations around the state were sent it.

Tymchuk adjourned the meeting at 12:20 p.m.

--Notes compiled by Jansson

Legislative Task Force on Heritage Vitality in Oregon
September 24, 2012
Meeting Notes

Task Force Appointees Attending: Jackie Edmunds-Manz, Kerry Tymchuk, Walter Frankel, Janet Taylor, Roger Roper, Terrie Martin, Rep. Bill Kennemer.

Task Force Advisors Attending: Bob Hart.

Staff: Kyle Jansson, Cara Kaser.

Public: None.

Tymchuk called the telephone meeting to order at 10:05 a.m.

Jansson reviewed what he expects to be in the report in addition to the narrative: the relevant ORS statutes, the county survey, the 2006 Oregon Museums Survey, a list of more than 1,000 heritage organizations in Oregon. He said he intended to submit it on behalf of the Task Force on Thursday.

Task Force members reviewed the revised draft and requested several changes in the text related to the heritage tourism study and other wording. There were no changes to the revised recommendations.

Taylor made a motion to adopt the report with the changes to the text that were discussed. Frankel second. Approved unanimously.

Tymchuk said he is drafting a news release that he anticipates releasing late in the week.

Tymchuk and Rep. Kennemer thanked the Task Force members for their service.

The meeting adjourned at 10:20 a.m.

-- Notes prepared by Jansson.