

# Oregon Cultural Trust Board Meeting December 20, 2023

9:00 am to 11:30 pm Cultural Trust Board Meeting

This is the rescheduled board meeting.

Topic: Cultural Trust Board Meeting

Time: Dec 20, 2023 09:00 AM Pacific Time (US and Canada)

Join Zoom Meeting

https://oregon4biz.zoom.us/j/87347575787?pwd=Z1QyTFdJK1A4T2V2VkViM05ZWVd4QT09

Meeting ID: 873 4757 5787

Passcode: 279567

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One tap mobile +12532158782,,87347575787#,,,,\*279567# US (Tacoma)





20-Dec-23 9:00 to 11:30pm

#### **Virtural Meeting**



 $\textbf{Link:} \ \underline{\text{https://oregon4biz.zoom.us/j/87347575787?pwd=Z1QyTFdJK1A4T2V2VkViM05ZWVd4QT09}}$ 

	9:00 AM	Welcome and Introductions	Niki Price, Chair
1 <b>Action</b> Page 6	9:05 AM	Minutes: August 31, 2023	Niki Price
2 Information	9:10 AM	Business Oregon Update	Sophorn Cheang, Director
2 Information Page 11	9:40 AM	Cultural Partners Updates	See Below for Partners
3 Information Page 24	10:10 AM	Strategic and DEIA Plan	Aili Schreiner, Trust Manager
4 Discussion Page 32	10:30 AM	Campaign Update	Carrie Kikel, Communications Manager
5 Break	10:50 AM	Break	
6 Information Page 40	11:00 AM	Executive Director Report and Legislative Update	Brian Rogers, Executive Director
7 <b>Action</b> Page 25	11:15 AM	Trust Board and Staff Updates	
8 Discussion	11:25 AM	Public Comment	
9 Action	11:30 AM	Adjourn	Niki Price

#### Oregon Cultural Trust Partners

Oregon Arts Commission	Subashini Ganesan-Forbes, Chair Oregon Arts Commission
Oregon Heritage Commission	Kuri Gill, Heritage Commission Coordinator
State Historic Preservation Office	Kuri Gill, Heritage Commission Coordinator
Oregon Humanities	Adam Davis, Executive Director
Oregon Historical Society	Eliza Canty-Jones, Director of Community Engagement

Unanticipated agenda items may or may not be included. The meeting is a Zoom meeting with phone conference option. A request for an interpreter for the hearing impaired or for other accommodations for persons with disabilities should be made at least 48 hours before the meeting to Raissa Fleming 503-986-0088. TTY 800-735-2900



#### Mission

To enhance the quality of life for all Oregonians through To lead in building an environment in which cultural the arts by stimulating creativity, leadership and organizations are sustained and valued as a core part of economic vitality vibrant Oregon communities.



#### Overview/Purpose

- Policy development and advice to government on programs related to arts
- Official state arts agency
- Grantmaking
- Advocacy
- Multiple programs (Community Development, Arts Education, % for Art)
- Policy development and advice to government on programs related to culture
- **Fund development**

Budget

- Grantmaking
- Advocacy
- **County/Tribal Coalition development**

#### Governance

9 Members Appointment by the Governor

11 Members Appointed by the Governor, confirmed by the Senate 1 House Member; 1 Senate Member

FTE **Budget** 4.5 Admin & Programs \$4,074,681 7 Contract (Percent for Art & Poetry Out Loud)

1 **Executive** \$4,659,418 Director

FTE

3.5 Fund Development, Communications, Assistant 2 Temps. 3 Contract (Communications & Website)

#### Revenue sources

General Fund, Federal Fund, Percent for Art, Cultural Trust, The Ford Family Foundation

Contributed, License Plate, Interest and Investment Earnings

#### Services & Technical Assistance

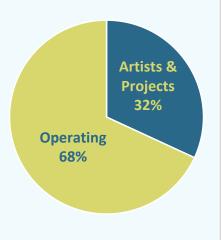
**Percent for Art Grant Trainings • Staff Outreach • Online Resources • Communications**  **Coalition Leadership** 

#### **Shared Services**

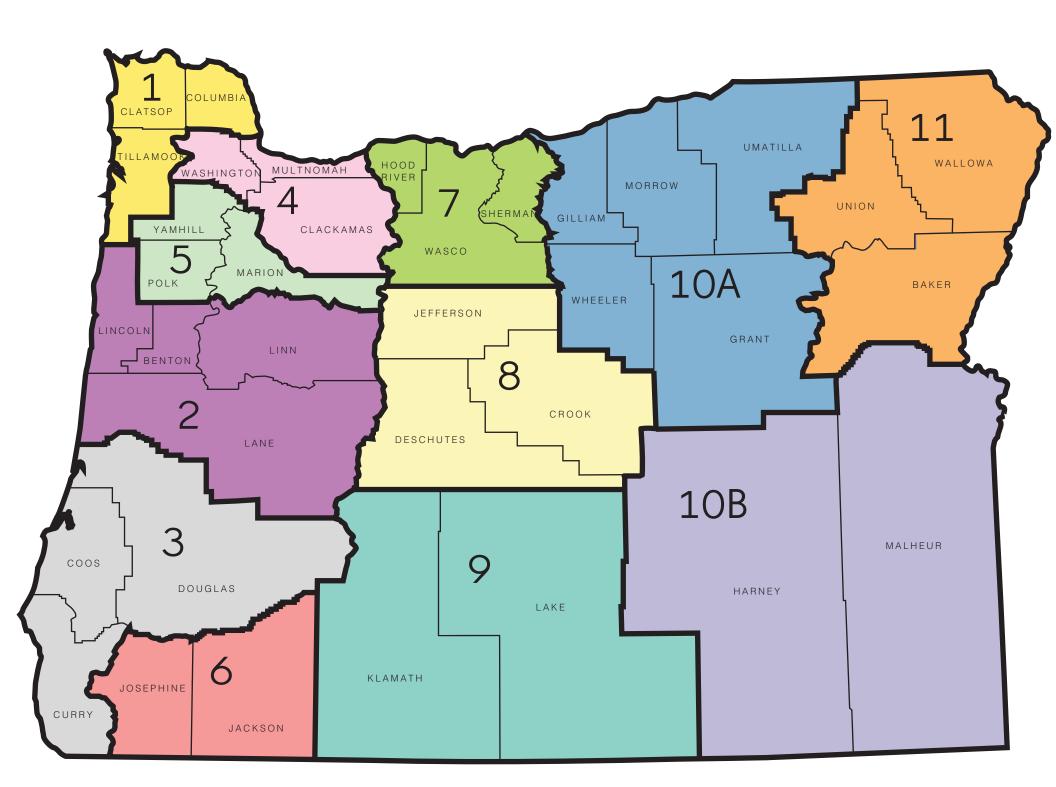
Office • Technology • Financial • Contracts • Human Resources • Administrative • Communication Staff • Cultural Resource Economic Fund \$9,510,728

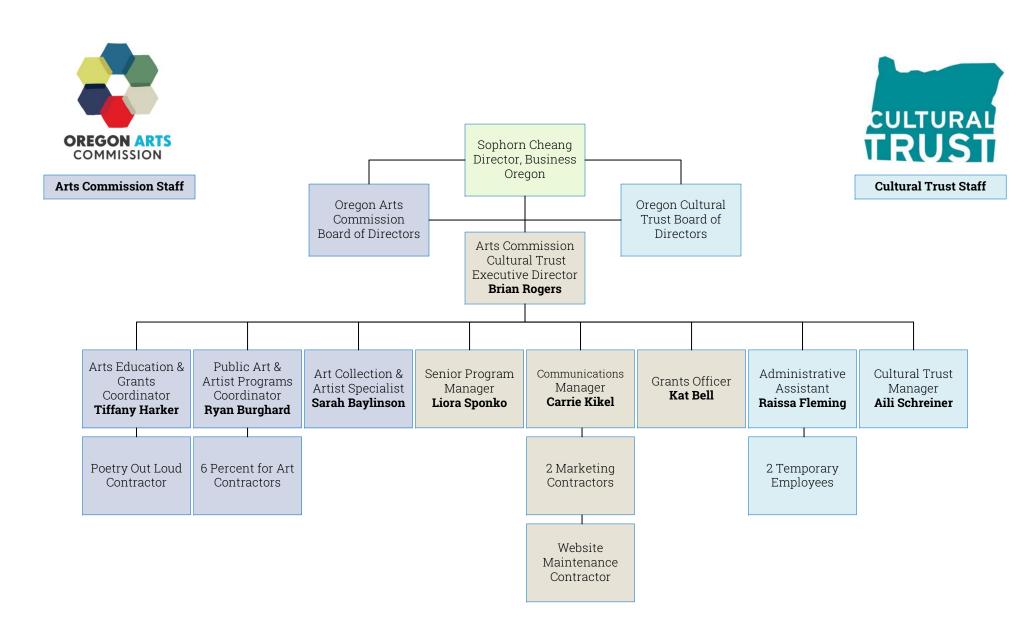
# Fiscal Year 2023: July 1, 2022 - June 30, 2023

Program	A	mount
Arts Access Reimbursement	\$	15,325
Arts Build Communities	\$	255,000
Arts Learning	\$	240,000
Career Opportunity	\$	109,053
Designated	\$	60,000
Fellowship	\$	63,000
Operating Support	\$	1,267,496
Small Operating	\$	318,000
Total	\$	2,327,874



1, 2022 Ouric 00, 2020			
Program	Aı	nount	
Cultural Development	\$	1,706,828	
Coalitions	\$	855,687	
Cultural Partners			
Oregon Arts Commission	\$	228,183	
Oregon Heritage Commission	\$	76,061	FY23 Donatio
Oregon Historical Society	\$	76,061	\$5,133,8
Oregon Humanities	\$	228,183	, -,,-
State Historic Preservation	\$	76,061	
Poet Laureate	\$	40,000	
Oregon Travel Information Council		35,000	
Organizational & Professional Development	\$	67,810	
Total	\$3	3,389,874	





**Arts Commission and Cultural Trust Staff** 

# Oregon Cultural Trust Board Meeting Minutes

August 31, 2023

Chehalem Cultural Center, Newberg

**Board Members Present**: Niki Price, Chair; George Kramer, Vice Chair; Sean Andries; Gustavo Morales; Deb Schallert; Chris Van Dyke.

**Board Members Absent:** Sen. Bill Hansell; Bereniece Jones-Centeno; Nathalie Johnson; Rep. John Lively; Myong-Hui Murphy; Gayle Yamasaki.

**Staff Present**: Raissa Fleming, Trust Assistant; Brian Rogers, Executive Director; Aili Schreiner, Trust Manager; Liora Sponko, Senior Program Manager.

Staff Virtual: Carrie Kikel, Communications Manager

Partners Present: Adam Davis, Oregon Humanities

**Partners Virtual:** Kuri Gill, Oregon Heritage Commission; Jennifer Alkezweeny, Oregon Humanities.

**Guests Present**: Sophorn Cheang (Director Business Oregon)

David Harrelson (Oregon Arts Commission)

**Guests Virtual:** Watson Creative Team (CEO Matt Watson, Aura Aragon-Ball, Angi Arrington, Tatiana Caraballo, Sean Miller and Trina Motto), Jim White (Non-Profit Association of Oregon)

#### Welcome and Call to Order

Niki Price called the meeting to order at 9:06 am. Price introduced Sophorn Cheang, Director of Business Oregon

#### Campaign Creative Presentation (Watson Creative)

Matt Watson and team presented "Make Culture Count" creative and strategy.

Chris Van Dyke said Watson's work is absolutely best-practice, combining art and science. Best work that explains the tax credit and impact and positive sense of energy.

George Kramer thought it was great. Searchable database question. Search by name or county. Will the names of our target audiences be used publicly as in history buffs? Watson clarified persona terms are internal and used only for targeting.

Van Dyke said "Who are we talking to?" is often skipped.

Sean Andries asked how much back-end system do we have? Watson said the campaign is automated. Every landing page connected to different form.

Aili Schreiner said we don't have CRM. Outdated Access database.

Price asked about messaging for The Comeback.

Carrie Kikel said it would be stories to raise awareness and celebrate organizations that are having success.

## Minutes: February 23, 2023

Motion: Kramer moved approval of the minutes from the February 23, 2023, meeting as presented. Seconded by Deb Schallert. *Motion passed unanimously.* 

## **Executive Director Report (Brian Rogers)**

Brian Rogers presented report.

Andres pointed out that a quarter of our donors are maxing out.

Kramer: How does this impact the fund? If we are asking for expansion, ask for \$2,500. On the assumption that we cannot do it again for 10 years.

Schreiner: Incentivizes support of other cultural organizations.

Cheang: Perfect timing to bring before Board. We have time to work with internal economist. Come back with more data for Trust Board. What is the right dollar amount? Could bring to next meeting.

HB2459 funded 78 venues. Coming through Business Oregon.

Cheang wants to check with DOJ so the Trust and OAC can get recognition on these grants. Rogers brought up that nonprofits know us but the for-profit organizations don't.

CACO will go into short session to ask for other funding.

Oregon is currently 38th in the country for appropriated arts funding

David Harrelson, vice chair of Oregon Arts Commission, was introduced and invited a Trust board member to come to next Commission meeting. Harrelson is also on Chemeketa Cultural Center board.

Harrelson is also the Cultural Resources Officer for the Grand Ronde Tribe and a Kalapuya member.

Harrelson discussed meaning of Chehalem as an outside place and Tribal members invited to fund raiser.

Andries said it started organization on a path to understanding and accessibility. What it means to have other culture have a space in an area that is primarily white, Andries talked about problems in Newberg school district re: Black Lives Matters, LGBTQ There is a hate blog in town.

Building is owned by Parks Dept. End up in the center of political controversy. Grappling with being a diverse organization with a community that is not supportive. Remarks about Crows Shadow show. Piece of work had to be taken down because of threats of violence.

Harrelson looked to add diversity to board. Must be done authentically. Andries discussed how many organizations have had to re-develop relationship on how they get donor financial support. How do we grade ourselves? What does it mean for OCT to have DEI?

Further discussion followed on sovereign governments and the different obligations and processes, including the structure of Trust funds and how they are distributed to the Tribes.

Kramer wants to know what battles our orgs are going through. How we distribute the money and separate. Kramer suggested looking at a coalition distributing the money for the Tribes. Price would like to see a committee started to work on this subject.

# Nonprofit Association of Oregon (Jim White)

Jim White from the Nonprofit Association of Oregon discussed impact measures for DEIA. Output is tracked. Because of complexity in our communities it is hard to get impact measures.

White discussed problems with high turnover in staff and board in organizations, burn-out and depressed wage structures, natural attrition in the sector. Insurance coverage (not keeping up with the reality of insurance company coverage). Greater complexities. Systems level:

- Charitable giving decreases.
- Almost all new CEOs at major foundations. Significand turnover.
- End of government "subsidies"
  - a. Back to "Maslow's Hierarchy"
  - b. Sense of "betrayal" by the government

• Rise of government "managing" culture (i.e.: PDX Office of Arts and Culture)

How does that look in the future when government manages culture?

NAO public policy activities in Oregon: Trying to simplify grants; nonprofit modernization grant funding and contracting. Working on clarifying SB619 on data privacy.

Federal work includes S.E.A.T. Act and streamlining Federal Grants act. Tax incentives for charitable deductions. Serving of sector-spanning national committees and work groups.

What role is there for the OCT. Cultural expression is the point of entry. Culture is built through trust. Trust is reliant on understood and respected culture.

Schreiner: Philosophical role of Trust connecting.

Harrelson: Liaison module in the State already exists. SHPO has this current module.

Discussion followed. Price asked if there was a specific activity the Trust could do?

White: (To hang on to culture at same time as being part of melting pot.) How do you support these catchall groups?

**Lunch**: 11:50 pm

Called back to order at 12:13 pm

#### Spending Plan for Fiscal Year 2024 (Brian Rogers)

Rogers presented report. License plate doing really well. He presented the grant funding scenarios.

#### Action:

Kramer moved to approve the 60/40 split on grant funding. Van Dyke seconded. *Passed unanimously.* 

Discussion followed on the split and administrative fund.

#### Grant Allocations for Fiscal Year 2024 (Aili Schreiner)

Schreiner presented report.

Andries would like to have further conversation on grant processes before next granting season.

Price would like to talk grant process at October meeting.

Conflicts of Interest: Andres declaring. Price declaring.

**Action:** Schallert moved to approve Option 3 with the exception of Chehalem Cultural Center and Lincoln City Cultural Center. Van Dyke seconded. *Motion passed unanimously.* Van Dyke moved to approve Option 3 awards for Chehalem Cultural Center and Lincoln City Cultural Center. Schallert seconded. Andries and Price recused themselves. *Motion passed unanimously.* 

Kramer moved to approve CPT grants. Andries seconded. Motion passed unanimously.

Kramer moved to approve Cultural Partner grants. Schallert seconded. *Motion passed unanimously.* 

## Strategic Plan and DEIA Process (Aili Schreiner)

Schreiner presented report.

## Oregon Humanities (Adam Davis)

Adam Davis presented report.

## Oregon Heritage Commission & SHPO (Kuri Gill)

Kuri Gill presented report.

# Oregon Arts Commission (Liora Sponko)

Liora Sponko presented report.

#### Staff:

Carrie Kikel said Watson will lead effort to promote license plate. Current plans include more billboards in strategic locations. Rogers continues to work with Business Oregon on approval of merchandise licensing agreement.

#### **Public Comment**

None.

#### Adjourn

Price adjourned the meeting at 1:28 pm.



#### December 20, 2023

TO: Oregon Arts Commission

FROM: Subashini Ganesan-Forbes, Chair

SUBJ: Oregon Arts Commission Report

### Arts and Economic Prosperity Study 6

The results of the study are in:

- Oregon arts & culture sector contributed \$829 million to Oregon's economy in 2022
- Randy Cohen, Vice President of Research for Americans for the Arts & Liora Sponko visited 9 communities across Oregon to announce these results.
- For the first time ever the AEP study included social impact measurements of arts and culture's effect on the well-being of communities and residents. 87.2% of respondents agreed with "I would feel a great sense of loss if this activity or venue were no longer available."
- Randy Cohen will present these results in a Zoom presentation on January 19th at 10am with a special Commissioner-focused presentation at 1pm
- Commissioners can help with spreading the world about the AEP study results and trying to get the information in their local newspapers etc.

Attached is the AEP6 State of Oregon one page summary of findings.

#### Commissioners

 Subashini and Brian have spoken with Jenny Stadler, Executive Director of PHAME and Jason Holland, Executive Director of Oregon Coast Council for the Arts for Commissioner positions.
 There is positive excitement from Stadler and Holland to serve and will be completing Commissioner application this month.

#### **Grant Evaluation Process**

The Grant and Equity Committee is working on an evaluation process to support the following goals:

- Increase accessibility of grant programs, especially for organizations and artists in rural, underserved and under-resourced communities
- Simplify grantmaking process for applicants
- Ensure grant programs continue to align with Arts Commission mission and goals
- Ensure funding level of each grant is consistent with our mission & goals

We have been brainstorming what is working and not working in each grant program and some overarching barriers to participation. At our next committee meeting, we will discuss our general priorities for grants, how we define impact and start the process of evaluating the Operating Support Grant and Career Opportunity Grant.

## Grantmaking

At the December Commission meeting the following grant programs and awards were reviewed and acted on.

- Arts Build Communities 97 applications received and 53 were awarded.
- Individual Artist Fellowships 139 applicants and 10 artists fellowships were awarded.
- Career Opportunity Program 54 applications received and 24 were awarded. The program supports individual artist to engage in career advancing opportunities. The program is a partnership with The Ford Family Foundation.
- Photo Documentation Program 67 applications and 25 were awarded. This is a one time program funded by the TFFF.

Informational only	$\boxtimes$	For commission input/discussion	For commission action



# The Economic and Social Impact of Nonprofit Arts and Culture Organizations and Their Audiences in

# **State of Oregon**

Direct Economic Activity	Organizations	Audiences	Total Expenditures
Total Industry Expenditures (FY2022)	\$498,381,039	\$330,920,191	\$829,301,230

#### **Economic Impact of Spending by Arts and Culture Organizations and Their Audiences**

Total Economic Impacts (includes direct, indirect, and induced impacts)	Organizations	Audiences	Total Impacts
Employment (Jobs)	9,203	3,858	13,061
Personal Income Paid to Residents	\$396,976,038	\$162,530,153	\$559,506,191
Local Tax Revenue (city and county)	\$8,549,770	\$10,643,406	\$19,193,176
State Tax Revenue	\$15,733,260	\$9,375,266	\$25,108,526
Federal Tax Revenue	\$80,360,089	\$30,630,831	\$110,990,920

#### Event-Related Spending by Arts and Culture Audiences Totaled \$330.9 million

Attendance to Arts and Culture Events	Local <sup>1</sup> Attendees	Nonlocal <sup>1</sup> Attendees	All Attendees
Total Attendance to In-Person Events	8,059,517	885,563	8,945,080
Percentage of Total Attendance	90.1%	9.9%	100.0%
Average Per Person, Per Event Expenditure	\$34.93	\$77.55	\$39.14
Total Event-Related Expenditures <sup>2</sup>	\$172,374,607	\$158,545,584	\$330,920,191

#### Nonprofit Arts and Culture Audiences Spend an Average of \$39.14 Per Person, Per Event

Category of Event-Related Expenditure	Local <sup>1</sup> Attendees	Nonlocal <sup>1</sup> Attendees	All Attendees
Food and Drink	\$12.41	\$18.64	\$13.03
Retail Shopping	\$6.82	\$10.40	\$7.17
Overnight Lodging (one night only)	\$5.36	\$27.87	\$7.59
Local Transportation	\$3.09	\$8.47	\$3.62
Clothing and Accessories	\$2.12	\$2.85	\$2.19
Groceries and Supplies	\$2.97	\$4.83	\$3.15
Childcare	\$0.39	\$0.39	\$0.39
Other/Miscellaneous	\$1.77	\$4.10	\$2.00
Overall Average Per Person, Per Event	\$34.93	\$77.55	\$39.14

Source: Arts & Economic Prosperity 6: The Economic and Social Impact Study of Nonprofit Arts and Culture Organizations and Their Audiences in the State of Oregon. For more information about this study or about other cultural initiatives in the State of Oregon, contact the Oregon Arts Commission.

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Past studies have focused primarily on the financial, economic, and tourism contributions of the nonprofit arts and culture industry. AEP6 expands beyond those topics to include measures of social impact. Surveys completed by individual attendees in the the State of Oregon demonstrate an appreciation for how the arts and culture impacts the development and well-being of the community and its residents.

#### Audiences Demonstrate Appreciation for the Impact of Arts and Culture

Level of Agreement with Social Impact Statements	Audiences
"This venue or facility is an important pillar for me within my community."	82.5%
"I would feel a great sense of loss if this activity or venue were no longer available."	87.2%
"This activity or venue is inspiring a sense of pride in this neighborhood or community."	89.3%
"My attendance is my way of ensuring that this activity or venue is preserved for future generations"	86.9%

#### **About This Study**

Americans for the Arts conducted AEP6 to document the economic and social benefits of the nation's nonprofit arts and culture industry. The study was conducted in 373 diverse communities and regions across the country, representing all 50 states and Puerto Rico. **The Oregon Arts Commission joined the study on behalf of the State of Oregon**. For additional information including the national report, summaries for the 373 communities, an online calculator, and of the methodology, visit <a href="www.AEP6.AmericansForTheArts.org">www.AEP6.AmericansForTheArts.org</a>.

#### **Surveys of Nonprofit Arts and Culture Organizations**

Nationally, detailed information was collected from 16,399 nonprofit arts and culture organizations about their FY2022 expenditures (e.g., labor, local and non-local artists, operations, materials, facilities, and asset acquisition), as well as their event attendance, in-kind contributions, and volunteerism. Surveys were collected from February through July 2023. Some organizations only provided total expenditures and attendance (they are included in the study). Responding organizations had budgets ranging from a low of \$0 to a high of \$375 million. Response rates for the 373 communities averaged 43.9% and ranged from 5% to 100%. In the State of Oregon, 689 of the 3,298 total eligible nonprofit arts and culture organizations identified by the Oregon Arts Commission provided the financial and attendance information required for the study analysis—an overall participation rate of 20.9%. It is important to note that each study region's results are based solely on the survey data collected. Therefore, the less-than-100 percent response rates suggest an understatement of the economic impact findings.

#### Surveys of Nonprofit Arts and Culture Audiences

Audience-intercept surveying, a common and accepted research method, was conducted to measure event-related spending by audiences. Attendees were asked to complete a short survey while attending an event. Nationally, a total of 224,677 attendees completed the survey. The randomly selected respondents provided itemized expenditure data on attendance-related activities such as meals, souvenirs, transportation, and lodging, as well as socioeconomic information, ZIP code of primary residence, and four social impact questions. Data was collected from May 2022 through June 2023 at a broad range of both paid and free events. In the State of Oregon, a total of 13,069 valid audience-intercept surveys were collected from attendees to nonprofit arts and culture events and activities during the period from May 2022 through June 2023.

#### Studying Economic Impact Using Input-Output Analysis

Americans for the Arts uses the IMPLAN platform to create the customized models for each of the 373 study regions. Input-output models calculate the interdependencies between various sectors or industries within a region. This analysis traces how many times a dollar is respent within the local economy before it leaks out, and it quantifies the economic impact of each round of spending. This form of economic analysis is well suited for AEP studies because it can be customized specifically to each participating community, region, or state. To complete this analysis for the State of Oregon, the researchers used the IMPLAN platform to build a customized input-output economic model based on the unique characteristics of the State of Oregon.

#### **Research Notes:**

- <sup>1</sup> For the purpose of this study, local attendees live within the State of Oregon; nonlocals live elsewhere.
- To calculate the total audience expenditures in the State of Oregon, first the audience expenditure findings were calculated for each of the participating sub-regions that are located within the State of Oregon. Next, the residency percentages and the average per person arts-related expenditure for residents and nonresidents were applied to any additional attendance data collected from organizations located within the State of Oregon but outside the participating sub-regions. Finally, the results were added to the findings from the individual sub-regions. It is important to note that, as a result, the aggregate audience expenditures for the State of Oregon do not equal the average per person event-related expenditure for locals multiplied by the total estimated attendance by locals plus the average per person event-related expenditure for nonlocals multiplied by the total estimated attendance by nonlocals.



# Parks and Recreation Department Oregon Heritage Commission

725 Summer St. NE, Suite C Salem, OR 97301-1271 (503) 986-0685 www.oregonheritage.org



# **Oregon Heritage Commission Report**

## **Oregon Heritage Conference**

The <u>Oregon Heritage Conference</u> will be in Forest Grove, April 17-20, 2024! Back in person for the first time since 2018. We have had listing sessions and an open call for proposals. Please joins us!

## **Oregon Main Street Conference Success!**

The conference, held in Independence, drew over 200 people.

## **Oregon Heritage Excellence Award Applications open**

The Oregon Heritage Excellence Awards recognize individuals, organizations and projects for outstanding efforts on behalf of Oregon heritage, drawing public attention to these efforts, and raising the quality of heritage-oriented activities. Awards will be presented during the 2024 Oregon Heritage Conference April 17-20 in Forest Grove. The awards are presented by Oregon Heritage, a division of the Oregon Parks and Recreation Department that houses the Oregon Heritage Commission and the Oregon State Historic Preservation Office.

The Oregon Heritage Excellence Awards honor those that have made the most of available resources and skills and are given for exceptional and meritorious work by organizations or individuals. Nominations are encouraged for organizations and projects of all sizes and heritage purposes and for volunteers and professionals from all heritage sectors. The Sally Donovan Award for Historic Cemeteries will specifically be awarded for excellence in work preserving Oregon historic cemeteries. In 2022 the Standout Heritage Volunteer category was added and is the only non-competitive category.

Action over and above the ordinary call of duty is an award prerequisite. Special consideration is given to the development of new ideas, approaches and innovations. The mere fulfillment of routine functions does not justify an award. Previous award winners will be honored a second time only if their new work represents a major improvement above the level for which they were previously honored. View past award winners and projects <a href="here">here</a>.

# Commission Kicks of Oregon Heritage Vitality Study 2

The Oregon Heritage Commission will be completing an Oregon Heritage Vitality Study to document the condition of heritage resources and organization. The first Oregon Heritage Vitality Study, completed just over 10 years ago, informed much of the work and many of the initiatives undertaken by the Oregon Heritage Commission and Oregon Heritage staff and results were used to support an IMLS grant that created Oregon Heritage MentorCorps, in addition to other technical assistance developed in response to the issues and recommendations. See the initial 2011 study <a href="here">here</a>. Work will begin in January with the UO Institute for Policy Research and Engagement.

# Joint Commission Meeting Held in Enterprise

The four commissions/committees of Oregon Heritage met jointly to better understand their roles and interconnections. The meeting included site visits in downtown Enterprise and Wallowa, Wallowa History Center, the Maxville site, and meals and information at the Wallowa Nez Perce Homelands Longhouse.

# Planning workshops offered throughout the state

The Oregon Heritage annual Fall Workshop series for 2023 aims at removing the stigma and fear around organizational planning by providing support and a pathway for organizations who'd like to embark on goal-setting journeys or establishing workplans for projects and organizational priorities. This workshop is an interactive workshop to lay stepping stones for where to begin on this process, especially when and where resources are limited for creating or executing a full-strategic plan, or there is hesitation or fear around that process. Opportunities here seek to remove the anxiety from the planning process, set goals, and ultimately help organizations prioritize workloads within their mission and eventual strategic plans. Information available here.

#### Work continues...

- Activate upper-floor study
- NW Digital Heritage HUB
- Disaster mitigation planning for historic resources grant from FEMA. Salem and Bend process is beginning now, plans will be completed by summer.



# Parks and Recreation Department Oregon Heritage Commission

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# **State Historic Preservation Office Report**

# SHPO position hiring in progress

We are in process of hiring an administrative position, two program analyst 1 positions, and one program analyst 2 position.

# **Oregon Main Street Revitalization Grant**

Funding will be available spring 2025.

# **2024 Oregon Historic Preservation Plan in progress**

Due to other priorities and National Park Service review periods, the plan release will be extended to June 2024.

# National Park Service lists properties on the National Register of Historic Places

- J.J. and Hazel Parker House, Portland
- Springfield High School, Springfield
- Cahill-Nordstrom Farm, Clatsop County

# Women's History MPD project starting

SHPO has started the process to develop a statewide Multiple Property Submission to list women's history properties on the National Register of Historic Places. SHPO is working with consultants to develop an approach to the documentation of and nomination to the National Register of Historic Places locations associated with women's history. This is a broad and complex topic that will be a challenge to address, in particular to be inclusive in the types of properties considered and people's stories being captured. The consultants provided initial concepts to the joint commission/committee meeting in October.

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#### Work continues...

- Heritage HUB database development for program and historic resource record management
- African American History MPD
- Historic Theaters Grant

# Oregon Humanities

To the Oregon Cultural Trust Board of Directors,

A lot is happening here at Oregon Humanities. It's my pleasure to share some of it with you.

Earlier this fall, we wrapped up our <u>Consider This series</u> on the theme of People, Place, and Power. This series included the following events: *Black Political Power in Oregon* with Joy Alise Davis, Keith Jenkins, and Marcus LeGrand; Vanessa Veselka, author of *Zazen* and *The Great Offshore Grounds*; Kiese Laymon, author of *Heavy* and *How to Slowly Kill Yourself and Others in America*; Mónica Guzmán, author of *I Never Thought of It That Way: How to Have Fearlessly Curious Conversations in Dangerously Divided Times*; Redrawing Borders with Alexander Baretich, Matt McCaw, and Carina Miller. Our current series is titled "Fear and Belonging" and kicked off October 11 with Casey Parks. We also held an event in Grants Pass on November 6 on Getting Older and Staying Connected. The events are recorded and posted to our website on this page if you'd like to check them out. We hope to see you at future events in-person or perhaps watching the live stream. If you'd like some complimentary tickets to any of our events, please let us know by emailing jennifer@oregonhumanities.org

We had some tough choices to make in our <u>Public Program Grants</u> this past year. We awarded \$100,000 to 16 organizations around the state. We exceeded our goal to award at least 60% of our funds to our two funding priority groups (Black Indigenous and People of Color led and serving organizations and Rural Organizations) with 81% of our funding going to those groups. Grant applications are reviewed by a committee made up of Oregon Humanities Board members, staff members and community members from across Oregon. Our next Public Program Grant cycle will launch in January 2024. Our Mini-Grants for Rural Libraries opened at the start of November <u>more information can be found here</u>.

The recent round of <u>Dear Stranger</u> invited folks to write about shelter and home. We encourage you to consider joining in this statewide letter exchange. The themes are connected to our <u>Oregon Humanities Magazine</u>. If you don't already receive this free magazine and would like to have it delivered to your home, please complete this form to subscribe.

Our podcast, <u>The Detour</u>, continues to explore challenging questions with writers, educators, artists, and activists, including our September episode on risk and danger with Kim Wilton, longtime helicopter pilot (including 100+ missions in Afghanistan) and trucker. We're also airing in partnership with several community radio stations around the state. Please feel free to follow/subscribe, recommend to your people and networks, and tell us what can be improved.

The <u>Conversation Project</u> catalog of over 20 facilitators and topics gets those folks from around the state out to different parts of Oregon both in-person and online. This past year we were excited to increase the number of facilitators for our most requested conversation on "<u>Housing and Belonging</u>" to have 5 folks who are able to lead that conversation. We encourage you to consider hosting this conversation in your community or workplace.

Our program, <u>So Much Together</u>, wrapped up a season full of both virtual and in-person in rural communities programming. These programs explored a range of topics including art making, death, the intergenerational climate movement, multigenerational communities, BIPOC artists collaboration, creativity and action, exploring evolving identities, and play connected to fright.

This year's <u>Humanity in Perspective (HIP)</u> course moved back to in-person (Portland) for our spring term offering, HIP has been online since spring of 2020. The winter and spring courses are in partnership with Portland State University. We were also able to run a week-long summer in-person course for youth in partnership with David Douglas High School. The current virtual course for fall term is up and running with students from across the state.

Our <u>facilitation training</u> takes place regularly in Oregon both online and at locations around the state. This past year we held an in-person training in Redmond and next year have plans for Eugene and Klamath Falls in addition to our usual Portland training and virtual offerings. We also provide this training as a custom offering for workplaces and organizations around the country.

Anis Mojgani, our current <u>Oregon Poet Laureate</u>, continued in his second term in the role and has received much positive press (<u>Portland Monthly</u>, <u>Willamette Week</u>, <u>Bend Source Weekly</u>, <u>Oregon360</u>, and others) regarding how he is connecting people to poetry in creative ways. The <u>nomination period</u> for the next Oregon Poet Laureate is open now.

In partnership with the Oregon Community Foundation, we're looking forward to the transition from the 2nd cohort to the 3rd cohort of <u>Fields Artist Fellows</u>. As Gabriel Barrera (Ashland), CarlaDean Caldera (Madras), Jason McNeal Graham (Redmond), and Sharita Towne (Portland) conclude their terms, two review committees are working their way through more than two hundred applications for the next cohort.

Among the things I'm excited for in the coming year is the pilot of our Facilitating Reflective Conversations training in Spanish, another pilot with the Deschutes Land Trust to co-lead reflective conversations outdoors on a trail hike, increasing the number of in-person So Much Together Programming in partnership with folks living in rural communities, the process to identify our next Oregon Poet Laureate, and so much more. Events are regularly added to our calendar and we hope to see you at one in the future. If you're downtown and want to

connect, we'd love to welcome you to our office at 610 SW Alder Street, Suite 1111, Portland, OR 97205. Thanks, as always, for Oregon Cultural Trust's partnership and support.

If you'd like to connect with us, please email Jennifer Alkezweeny, program director, at jennifer@oregohumanities.org

# Oregon Historical Society

Report to the Oregon Cultural Trust, October 2023



# **Public Programs**

The 2023 Hatfield Series concluded with presentations by Mae Ngai, Douglas Brinkley, and Peniel Joseph, including a special educator book-group discussion on Joesph's *The Third Reconstruction*. OHS hosted the kick-off to our 2024 Hatfield Series with a lecture by Jonathan Eig, on his highly acclaimed biography, *King: A Life*, on October 17, and announced that evening the full series line-up, including Kelly Lytle Hernández, Liz Cheney, Ned Blackhawk, and H.W. Brands. Virtual and in-person tickets for the full series are on sale now.

On April 6, we hosted a discussion between Dr. Darrell Millner and Dr. Carmen Thompson, celebrating the publication of Thompon's book, *The Making of American Whiteness*. Dr. Thompson wrote to OHS staff the next day, reflecting on the standing-room-only crowd: "It is clear that people in the Portland area truly want to understand and are interested in issues of race, Whiteness, and social justice."

#### **Exhibitions**

Currently on display in OHS's Brooks Julian gallery is *Our Unfinished Past: The Oregon Historical Society at 125*, which closes December 17. Also on display at OHS are: *Main Streets: Wesley Andrews Photo Postcards*; *Observing the Past, Planning for the Future: 50 Years of Oregon Land Use Planning; All Classical Radio: Orchestrating Magic for 40 Years; Sagebrush to Stumptown: Portland Youth Philharmonic's Astonishing First Century; Celebrating Birds of the Pacific Northwest, and Birds of the Pacific Coast, highlighting the paintings of R. Bruce Horsfall for his 1923 book of the same name.* 

OHS's traveling exhibitions, which are booked at venues across the state, continue to be popular: The Call of Public Service: The Life and Legacy of Mark O. Hatfield; Oregon Voices; Many Happy Returns: 50 Years of the Oregon Bottle Bill; and Brave in the Attempt: Celebrating 50 Years of Special Olympics Oregon.

### Research Library

OHS's research library staff made available through UO's Libraries' Historic Oregon Newspapers website the full run of the Valley Migrant League's (VML) newspaper, Opportunity News, held in the OHS collections. The VML was a private, nonprofit organization that provided services to migrant farm laborers in Oregon's Willamette Valley during the 1960s and 1970s. OHS staff have also digitized selections from the VML photographs collection, many taken for the newspaper, and made them available on the OHS Digital Collections website. Two articles published in the Summer 2023 issue of the Oregon Historical Quarterly, by historian Mario Sifuentez and OHS Photographs Librarian Laura Cray, explore the significance of this work; you can read them <a href="here">here</a>.

The research library is free and open to everyone open for walk-in researchers, who are encouraged to contact <a href="mailto:libreference@ohs.org">libreference@ohs.org</a> in advance so the reference staff can help plan for relevant materials to be available. You can read about a few of the people whose widely varied research interests bring them to the library in <a href="mailto:this blog post">this blog post</a> by OHS Reference Librarian Nikki Koehlert.

#### Education

OHS hosted the 2023 Oregon History Day contest on April 29 at Willamette University and joined 34 students from across the state at the national contest in Washington, DC,

# Oregon Historical Society

## Report to the Oregon Cultural Trust, October 2023



in June. Thanks to support from private donors, OHS alleviated financial barriers for any student or educator who would otherwise not have been able to participate in the contests. OHS staff have formed a rural educator cohort to provide support and guidance for incorporating the History Day curriculum into classrooms.

OHS released three new sets of curricula — "Experience Oregon History," "Racing to Change," and "It Did Happen Here" — that will help educators across the state meet new Social Sciences Standards Integrated with Ethnic Studies. The Experience Oregon History curriculum offers educators the first units on Oregon history for K-12 students that are aligned with those new standards. OHS developed the Racing to Change curriculum in partnership with Oregon Black Pioneers, to be aligned with the exhibit by the same name that was originally hosted at OHS is now available in an online version through the Oregon Black Pioneers website. Through the "It Did Happen Here" curriculum, for grades 9–12, students connect policies from Oregon's early decades to racism in the last decades of the twentieth century, including the rise of hate groups in the 1980s; it was developed in collaboration with Erin Yanke and Mic Crenshaw of the award-winning podcast by the same name and with the Western States Center.

OHS also welcome Dora Lisa Chavez as our new Museum Educator. In this new position, Dora Lisa is responsible for the content of our school and adult tour program, including welcoming groups in both English and Spanish. One of her key focuses is training volunteer educators (formerly "docents") and revamping our guided tour program, which is slated to return in winter 2024. In addition to developing tours, Chavez will be creating more opportunities for school groups to engage with exhibitions in ways that support OHS's commitment to accessibility, equity, inclusion, and enhanced belonging.

# Oregon Historical Quarterly (OHQ)

Throughout 2023, *OHQ* has published pieces that delve into the work and history of OHS, as part of the staff's work to recognize OHS's 125th anniversary, with the Winter 2023 issue expected to be all about OHS. Reflecting on our own organizational history and work is an important opportunity for OHS, as a public history institution, to learn about and share the ways we have grown and changed.

The Fall 2023 issue includes a special section on the history of humans' relationships with sea otters in Oregon. The articles and essays in that section reflect collaborative work by authors and researchers from a variety of backgrounds, including tribal scholars. A footnote on the title page of one article informs readers of OHQ's commitment to publish work that is largely focused on Indigenous history only with the significant involvement, as author or peer reviewer, of at least one Indigenous person. This commitment is related to a broader set of commitments and actions undertaken by OHS staff regarding Native knowledge and relationships, which are now outlined in a two-page statement in each issue of OHQ. Staff-members expect those commitments to change over time, as we take appropriate action in response to feedback and advice from Native colleagues.

# The Next 125 capital campaign

OHS announced The Next 125 capital campaign on December 17, 2022. Focused on education, preservation, and access, the funding secured through this campaign will support the creation of a new core exhibition on the history of Portland, support and

# **Oregon Historical Society**

Report to the Oregon Cultural Trust, October 2023



resources for teachers statewide with an emphasis on new Ethnic Studies standards and rural communities, upgrades to our digital history projects, and enhancements to the storage of our priceless collections. The \$10million campaign is about 90 percent funded, including a new \$3million endowment to support the salary of the Boyle Family Executive Director. Several campaign projects are fully funded already, but we have many opportunities for public, corporate, and foundation support of this important work. The campaign is expected to conclude on OHS's 125th birthday, in December 2023.



#### November 16, 2023

TO: Cultural Trust Board Members

FROM: Aili Schreiner, Cultural Trust Manager

SUBJ: Review & Adoption of Cultural Trust Strategic Plan

A final draft of the 2023-2027 strategic plan is ready for discussion and adoption by the Cultural Trust Board of Directors.

This plan has been crafted over the course of 12 months and the 2023 legislative session. Following a retreat in fall of 2022, two planning committees regularly convened to create three key areas of focus for the next five years. The Strategic Planning committee (Sean Andries, Chris Van Dyke, and Gayle Yamasaki) worked with staff to identify overarching goals, objectives and activities. The Diversity, Equity and Inclusion committee (Sean Andries, Myong-Hui Murphy, Museum of Warm Springs Executive Director Liz Woody, and Multnomah County Cultural Coalition member Taaj Armstrong) drafted the Cultural Trust's DEI statement and outlined commitments to DEI to be embedded directly into the Trust's strategic plan.

The final draft of the plan includes a preamble, contextualizing our aspirational plan within external challenges and opportunities. With the successful outcome of HB 3532, the plan also assumes strategic investments will be made in the internal capacity of the Trust to achieve the goals and objectives of the plan. Cultural Trust DEI commitments will also include those found in Business Oregon's DEI plan, scheduled for adoption in 2024.

Once approved by the Board, staff will work to publish the plan on its website and share it with its Partners, County and Tribal Cultural Coalitions, cultural nonprofits and Trust donors. Staff will prepare annual workplans with key milestones and metrics which will be reported on annually.

When reviewing this plan, the staff ask that certain priorities be considered, chiefly:

- Investment in Cultural Trust staff, systems and technologies that improve
  efficiencies and organizational stability. This includes integrated donor and grant
  management systems and digital communications such as visual representations of
  CNP, Coalition, and other grant recipients using online mapping features
- Prioritize robust grantmaking, communication, and advocacy support for Coalitions
- Work with Tribes to unlock funding for those currently unable to accept awards

- Support legislative priorities: tax credit increase
- Pursue options for more freedom and flexibility for Cultural Trust as a distinct organization
- DEI goals as part of work, create meaningful metrics
- Raise more funds for culture\*
- Market/Economic considerations reflected in growth goals; index growth goals to overall economic growth
- Meaningful engagement with Board
  - Grassroots advocates
  - Grassroots fundraising

\*Since its inception, the Cultural Trust has seen its number of donations, and total funds raised, increase over time. Stronger economic performance years generally translated into greater numbers of gifts and total dollars raised. With an eye to historic performance, staff aspires to an average 5-7% increase in number of donations and total dollars raised over the next five years.

Members of the Cultural Trust Board are encouraged to review and discuss the final plan

for clarity, consensus on c	ontent, and plans for ongoing evalua	ation.
Requested Action:  Informational only	☐ For board input/discussion	

## FINAL DRAFT

Strategic Plan: Oregon Cultural Trust 2023-2027

#### **PREAMBLE**

The Oregon Cultural Trust Board of Directors and staff are committed to achieving the goals outlined in this aspirational strategic plan. We are grateful for the many hours of community member input that shaped and informed this work. We recognize that reaching our goals is contingent upon many factors, including successful legislative outcomes and capacity investments. We look to this plan to navigate future challenges and opportunities in our service to the people of Oregon.

## Our commitment to Diversity, Equity, and Inclusion

The Oregon Cultural Trust supports a future where Oregonians express, celebrate, and pass on the diverse lived experiences of their cultures and histories in ways significant to them. As a division of the Oregon Business Development Department, the Cultural Trust also shares and supports our agency's goals outlined in the agency's Diversity, Equity and Inclusion plan.

#### Our Vision

We envision an Oregon that champions and invests in creative expression and cultural exchange, driving innovation and opportunity for all.

#### Our Mission

To lead Oregon in cultivating, growing and valuing culture as an integral part of communities. We do this by inspiring Oregonians to invest in a permanent fund that provides annual grants to cultural organizations.

#### **OUR PLAN**

The Cultural Trust's five-year strategic plan will set priorities and guide the work of the Board and staff. Three core areas of Advancement, Capacity and Resources have been identified. Incorporated into core area objectives are commitments to diversity, equity and inclusion specific to the role of the Cultural Trust. This plan will be reported on annually by staff to the Board of Directors and evaluated using key plan milestones and timelines.

## **ADVANCEMENT**

Champion Oregon's arts, heritage and humanities sector to serve all Oregonians

Objective A: Engage and inform legislative advocates and partners.

Within this objective, the Cultural Trust's commitment to diversity, equity and inclusion is rooted in making the case for "culture" writ large. The Trust recognizes and affirms that cultural expression is foundational to prosperous communities. To that end, the Cultural Trust will gather and share data that is meaningful to cultural organizations and the communities they serve. Success in our work will be measured first and foremost by positive community impact. The Cultural Trust will prioritize greater transparency in our where funds go and how they are leveraged. Our work will prioritize those partnerships committed to community impact. In our roles as a state agency representing Oregon's arts, heritage and humanities, the Cultural Trust will convene cultural agencies to support inclusive goals and priorities that best serve our field.

#### Actions:

- Elevate Oregon's cultural sector as a legislative priority by establishing the Arts and Culture Caucus.
- Provide Arts and Culture Caucus with access to data and cultural events.
- Provide regular and strategic communication with legislators on the impact of Cultural Trust's funding on the cultural sector.
- Improve awareness of Oregon's cultural tax credit among elected officials at the local and state level.
- Cultivate strategic partnerships with local and statewide organizations
- Collaborate with cultural statewide service agencies to set and present legislative priorities.

## Objective B: Promote the impact and value of Oregon's diverse cultural network.

Within this objective, the Cultural Trust's commitment to diversity, equity and inclusion includes creating regional and culturally specific data that promotes direct giving by local donors. Barriers to access the Cultural Tax Credit for lower income donors will be addressed.

#### Actions:

- Develop a diversity, equity, accessibility, and inclusion plan that is responsive to all regions in the state.
- Create an educational/community advocate Cultural Ambassador program to engage cultural leaders and donors to promote the Cultural Trust and tax credit.
- Promote the arts, heritage and humanities as essential to community and economic development.
- Communicate cultural expression as a vital and integral element of healthy communities.

# Objective C: Increase annual cultural funding by engaging prospective and existing donors.

Within this objective, the Cultural Trust's commitment to diversity, equity and inclusion includes a commitment to focused efforts on the value and impact of all contributions, regardless of amounts, fostering a culture of giving more accessible to lower income donors. Working with cultural funders, we will uphold the value of inclusivity and demonstrate those values across our grant programs, partnerships, and initiatives.

#### **Actions:**

- Develop marketing and outreach strategies that increase donor contributions
- Increase number of donors by 5-7% annually
- Increase total donations annually by 5-7%, adjusting for inflation
- Increase impact of tax credit limit in the 2025-27 legislative session
- Work with cultural funders to increase funding to the sector.
- Maintain or increase sales of the Cultural Trust license plate each year

#### CAPACITY

# Increase capacity and access to resources by investing in Oregon's arts, heritage, and humanities sector

**Objective A:** Assess grant programs to respond to and support the evolving needs of the cultural sector.

Within this objective, the Cultural Trust's commitment to diversity, equity and inclusion includes investing in tools and resources that reduce barriers and diversify engagement in our work. To support our County and Tribal Cultural Coalitions, a shared grant management platform will streamline local processes while efficiently gathering and sharing data. In honor of our peer-review grant review process, the Cultural Trust will compensate reviewers for their time and expertise, ensure geographic and cultural diversity among panelists, and streamline processes.

Also within this objective is the commitment to explore how we can best serve Oregon's indigenous peoples. We commit to assessing how diversity, equity and inclusion is best served through our grant programs, including barriers to the application process, how Cultural Trust funds may be used, and expectations of grant recipients in fostering their organizations own diversity, equity and inclusion initiatives. The Cultural Trust will continue to prioritize funding for activities that

advance the mission of the Cultural Trust, including our diversity, equity and inclusion goals, and that result in meaningful outcomes.

#### Actions:

- Review and implement a new grants management system to improve access to communities across the state.
- Improve grant application review processes based on community input.
- Conduct a cultural service and support gap analysis to determine potential unmet needs.
- In response to the cultural service and support gap analysis, review and revise grant programs.
- Integrate diversity, equity, inclusion, and accessibility objectives into grant programs to broaden access to funding.

# **Objective B:** Strengthen Oregon's cultural network of County and Tribal Cultural Coalitions.

Within this objective, the Cultural Trust's commitment to diversity, equity and inclusion includes increased support for our County and Tribal Cultural Coalition members and network. A focus will be to reduce administrative burdens while empowering regional capacity in grantmaking, fund development, and advocacy efforts. The Cultural Trust will centralize data collection and sharing, using community-defined metrics of success, while supporting best practices for urban and rural diversity, equity and inclusion priorities. We will partner with County and Tribal leadership to reduce barriers to Cultural Trust funds and grantmaking.

#### **Actions:**

- Convene quarterly Coalition meetings to share information and provide support.
- Survey Coalitions for long-term needs.
- Develop rural outreach programs in coordination with Coalitions.
- Implement Coalition capacity building process, including administration, grants management system, marketing and communication support, and updating cultural plans.
- Ensure all nine federally recognized tribes receive Coalition awards.

# Objective C: Fully engage the five Cultural Trust Partners to develop strategic statewide investments.

#### Actions:

• Support Cooperative Partner grantmaking initiatives that invest in the field including trainings and workshops.

- Explore hosting cultural gatherings every two years for organizations and individuals.
- Engage Partners in annual fundraising efforts.

# **Objective D:** Expand services to Cultural Nonprofit network (CNP).

Within this objective, the Cultural Trust's commitment to diversity, equity and inclusion includes finding and adding culturally-specific and/or emerging cultural nonprofits to our list of eligible cultural nonprofits. We are also committed to gathering and sharing data on the impact of their work in community and within cultural nonprofit organizations centered on community-centered metrics.

#### Actions

- Survey and research CNP needs and opportunities.
- Create and implement a CNP toolkit that supports the work of cultural nonprofits while advocating for the Cultural Tax Credit.
- Share CNP impact stories in communication and advocacy work.
- Develop workshops and educational trainings for CNPs.

# Objective E: Expand and strengthen strategic partnerships.

Within this objective, the Cultural Trust's commitment to diversity, equity and inclusion includes fostering a culture of donor inclusivity, where contributions of any amount are celebrated and encouraged. Our leadership within the cultural sector will embody the adage "nothing for us without us" in all work with community.

#### Actions

- Continue to explore fundraising partnerships.
- Serve as a leader, advisor and convener for the cultural community.

#### RESOURCES

# Maximize the effectiveness of the Cultural Trust

**Objective A:** Increase and modernize the Cultural Trust's ability to serve Oregonians.

#### **Actions:**

- Revise administrative spending cap set in statute through legislative process to remove the \$400,000 cap and replace with percentage of permanent fund
- Review current capacity and staffing structure.
- Request additional positions for administration and campaign support in the legislative process.

• Modernize grant and donor management systems.

Objective B: Increase Board and volunteer engagement and commitment to supporting culture.

Within this objective, the Cultural Trust's commitment to diversity, equity and inclusion includes engaging cultural leaders from culturally and geographically diverse backgrounds.

#### **Actions:**

- Develop Board Committees to focus on capacity building, governance, marketing/communication, and DEIA.
- Build relationships with cultural nonprofit board members and grantees.
- Develop educational trainings for CNPs to promote the cultural tax credit.

TO: Cultural Trust Board Members

FROM: Carrie Kikel, Communications Manager

SUBJ: Campaign Update

NOTE: This memo has been updated since being shared via email last month.

The 2023 Cultural Trust campaign is in its final weeks and we are pushing hard! Response to our new creative is overwhelmingly positive and the Make Culture Count creative is fully integrated into all of our materials, including refreshed content on the <u>website</u>, stunning new collateral – including our first-ever color brochure – updated digital and print ads, a new PowerPoint presentation, new letterhead and new standing banners on display in prominent cultural venues.

Watson Creative is our lead campaign contractor and Bell+Funk is serving a support services role. Watson oversees all creative, strategy and advertising, including a robust digital campaign, and Bell+Funk is lead on Coalition/CNP outreach including board presentations and webinars.

#### Digital and Traditional Media

Our advertising commitment totals \$100,000 and features digital ads totaling \$60,000 on Google, Meta and behaviorally targeted programmatic digital platforms. Our traditional placements total \$40,000 and feature investments in OPB, KLCC, Jefferson Public Radio, Oregon Business and the ongoing partnership with Willamette Week Give!Guide. In addition, we have a \$12,500 partnership with Here is Oregon that will include two stories and two videos. Both stories will be featured in the Sunday Oregonian and on OregonLive.com social. We also have invested in the Oregon Society of CPAs, with an ad and a letter featured in their membership newsletter.

Our very good friends at KMUN radio produced a 30-second PSA and distributed it to 38 statewide stations that make up Oregon Community Media. Aili shared the PSA with all nonprofit radio stations on our list as well.

Watson's campaign featured three phases that focus on awareness (<u>Don't Settle for Half</u>), education (<u>That's Simple</u>) and conversion (<u>The Comeback</u>). All digital ads direct viewers to a specific landing page on the website.

The campaign launched on Monday, Oct. 3 and we received a 15-day digital results summary from Watson that demonstrated we achieved 109 percent of our goal in website visits. At that point the digital campaign had delivered 1.2 million impressions and 6,782 visits to the Don't Settle for Half landing page. Our latest report, covering through November, showed that we achieved 94 percent of our goal for website visits that resulted in a 1.82 percent conversion rate (exceeded a modest target of 1 percent). We received 490 online donations in November; 144 of those were a direct result of our digital campaign.

The Watson team is reviewing campaign metrics and performance constantly and optimizing by elevating the visuals and messaging that are getting the best results while sleeping those that are not. It's clear they are at the top of the field in this work and we are very fortunate to have them on board.

By the end of the year, all who engage with the digital campaign will receive a series of automated emails that welcome them, encourage them to share with a friend and remind them about the Cultural Tax Credit deadline. When they make a donation, they will be automatically sent to a new Thank You page on the website.

#### **Board Presentations and CNP/Coalition Outreach**

Meanwhile, Trust Manager Aili Schreiner has been successful in confirming board presentations for almost all of our FY2024 CDV grant recipients and is doing the bulk of the presentations, sometimes two or three a day! Jen Bell of Bell+Funk is supporting virtual presentations and has presented two webinars for people engaged by the Cultural Trust quiz – a pop up on our website. Aili also led a Zoom presentation for grant recipients and County Coalitions that emphasized all they can do to support the campaign. We also mailed packets of the new collateral to 205 CDV and Organizational & Professional Development grant recipients, Coalitions and Partners.

Our website features a <u>refreshed toolkit</u> for outreach work that incorporates the new creative.

Year-end social efforts include a "qualified" graphic and customized donor appeal circulated to all 1,600+ CNPs last week. It inspires giving to the nonprofit while leveraging the tax credit opportunity. We also are using our new contract writers to produce a series of 10 social posts featuring grant projects and demonstrating how the organizations Make Culture Count in Oregon.

#### Mailings and Op Ed Letters

Our fall appeal letter, which features Don't Settle for Half messaging, hit mailboxes Nov. 17. A reminder postcard landed last week. The mailing list includes all donors, Coalitions and ARPA grant recipients.

Aili worked with Heather Kmetz, a tax partner at Sussman Shank LLP, to draft an opinion letter promoting the value of the Cultural Tax Credit that is now being circulated to financial networks and has been submitted to the Portland Business Journal. Carrie worked with board members – thank you! – to place at least a dozen op ed letters with media outlets across the state. To-date more than half have been posted.

#### Celebrate Oregon! Campaign Integration and PSU Mural

One of the hallmarks of our new creative is full integration of the Celebrate Oregon! artwork, which showcases Oregon's arts, heritage and humanities.

We are excited to share that we just confirmed we will rehome the mural that was at Portland International Airport in the Viking Pavilion sports arena at PSU's Peter W. Stott Center. We hope to install the mural in early 2024 with an unveiling event featuring diverse student groups and cultural presentations. Watson will launch a license-plate specific campaign just after the first of the year!

#### Give!Guide Big Give Day Dec. 30: Oregon Heritage Tour

The Cultural Trust always sponsors the last Big Give Day of the year for the Willamette Week Give!Guide and this year we really think we've outdone ourselves! All who donate at least \$10 on Dec. 30 will be entered to win the <u>Oregon Heritage Tour</u> - a getaway package that includes exclusive tours of three iconic heritage sites: The Liberty Theatre/Home of Little Theatre on the Bay in North Bend; the Santiam Pass Ski Lodge near Sisters; and Athena's Gem Theatre in Athena. Robust renovations are nearing completion at each of the sites, supported by Trust funding.

The package includes lodging, cultural tickets and meals, including a nine-course tasting menu with wine pairing at Restaurant O in Coos Bay valued at \$432!



# DON'T SETTLE FOR HALF



For more than two decades, the Oregon Cultural Trust has played an essential role in enriching cultural resources across our state by supporting more than 1,600 nonprofits. The Cultural Trust and its donors continue to weave a unique and awe-inspiring cultural tapestry, united by artistry, defined by stories and guided by wisdom. As a cultural donor, **don't settle for half — make the whole impact!** 

How? It's simple. The Cultural Trust empowers Oregonians to leverage their support to arts, heritage and humanities nonprofits with the Cultural Tax Credit. When you match your cultural donations with a gift to the Oregon Cultural Trust, you play a vital role in funding more than 1,600 cultural organizations. And come tax time, you will receive a 100% state tax credit refund for your donation to the Cultural Trust.

By using the Cultural Tax Credit, Oregonians and the Cultural Trust have awarded close to \$40 million, and counting, to the amazing cultural nonprofits that define our communities and our quality of life. Cultural organizations need our whole support. **Imagine if only half of these projects and programs were supported:** 

- Hundreds of students attending free events at the Four Rivers Cultural Center, the primary cultural experience provider in very rural Ontario;
- A much-needed new roof for the historic WOW Hall in Eugene; and
- Funding for community programs supported by our essential 45 County and Tribal Cultural Coalitions, ensuring cultural access across the state.

**DON'T SETTLE FOR HALF.** By matching your cultural donations to the Cultural Trust you make the whole impact for Oregon's cultural network. You help foster innovation. You create access where barriers exist. You empower creative initiatives.

continued



ľm	supporting Oregon's	arts,	heritage	and	humanities	with
my	contribution of:					

my continuation on							
□ \$25   □ \$100	□ \$500	S1,000	S1,500	☐ \$2,500	Other		
CREDIT CARD NUMBER	or ENCLOSED	CHECK		EXP. DATE		SECURITY	CODE CODE
DONOR NAME(S)							
ADDRESS				CITY		STATE	ZIP
PHONE		EMAIL	. (NEW OR UPDA	ΓED)			

Mail this form with your credit card info or check payable to the Oregon Cultural Trust to: Oregon Cultural Trust, 775 Summer Street NE, Suite 200  $\mid$  Salem, OR 97301



## Before December 31, take three steps to make your WHOLE impact:

1.

#### **ADD THEM UP**

Add up all the generous donations you made to one or more of our 1,600+ qualifying cultural nonprofits this year.



#### **MAXIMIZE YOUR IMPACT**

Take the total number you calculated in Step 1 and donate the same amount to the Cultural Trust. Gifts of any amount help grow our pool of statewide funding, and there are many ways to give (credit card, check, stock, IRA funds, etc.).



#### **SCORE THE TAX CREDIT**

Enter the amount you matched to the Oregon Cultural Trust on your 2023 Oregon Tax Form to claim your tax credit. NOTE: Maximum tax credit limits are \$500 for individuals, \$1,000 for couples filing jointly and \$2,500 for C-class corporations.

**Questions?** Call us at (503) 986-0088 or visit www.culturaltrust.org. Join our movement by taking your support of Oregon's arts, heritage and humanities to the next level.

Congratulations! You are making culture count with your whole support!

Yours for culture,

*Board members* Sean, Bereniece, Chris, Deb, Gayle, George, Gustavo, Myong-Hui, Nathalie and Niki

Staff members Brian, Aili, Carrie, Kat, Liora and Raissa

P.S. If you have already donated this year, thank you! Please share how you made your whole impact with family and friends before December 31!

## **QUESTIONS?**

Contact the Cultural Trust at (503) 986-0088 or via email at cultural.trust@biz.oregon.gov or consult your CPA.

**LEARN MORE** at culturaltrust.org or by scanning here:



#### **DONATE**

by mail using the form on the other side of this letter online at culturaltrust.org by phone at 503-986-0088





# Support Oregon Culture AND Earn a Tax Credit for it!

Follow these three steps to become eligible for the Cultural Tax Credit:

#### **ADD THEM UP**

Total your cultural donations this year.

See the full list of qualifying nonprofits on our website.

# MAXIMIZE YOUR IMPACT

Match this amount to the Oregon Cultural Trust.\*\*

# SCORE THE TAX CREDIT

Claim your tax credit on your Oregon tax form.

<sup>\*\*</sup>Tax credit limitations apply.



# MAKE THE WHOLE IMPACT ON **OREGON'S CULTURAL LANDSCAPE.**

# HERE'S HOW.



COUNT

culturaltrust.org



CULTURE



empowers Oregonians to leverage will receive up to a 100% refund in the organizations. And come tax time, you to fund more than 1,600 cultural direct a portion of your state taxes to the Oregon Cultural Trust, you your cultural donation with a gift Cultural Tax Credit. When you match their support for arts, heritage and How? It's simple. The Cultural Trust form of a state tax credit. humanities nonprofits with the

Oregon's arts, heritage and humanities life. Join us by taking your support of nonprofits that define our quality of Oregonians and the Cultural Trust By using the Cultural Tax Credit, to the next level. Make culture count. and counting, to the cultural have awarded close to \$40 million,

DON'T SETTLE FOR HALF.

**MAKE THE** WHOLE IMPACT **FOR** OREGON CULTURE.

culturaltrust.org



than 1,600 nonprofits across Oregon cultural resources, supporting more a vital role in enriching our state's Oregon Cultural Trust has played **ABOUT THE CULTURAL TRUST** 

For more than two decades, the

inspiring cultural tapestry, united by We have woven a unique and awe-

by wisdom.







# Support Oregon Culture AND Earn a Tax Credit for it!



Follow these three steps to become eligible for the Cultural Tax Credit:

## **QUESTIONS?**

Contact the Cultural Trust at (503) 986-0088 or via email at cultural.trust@biz.oregon.gov or consult your CPA.

**LEARN MORE**at culturaltrust.org
or by scanning here:



#### **ADD THEM UP**

Add up all the generous donations you've made to one or more of our qualifying nonprofits this year.

See the full list of qualifying nonprofits on our website.

# MAXIMIZE YOUR IMPACT

Take the total number you calculated in Step 1, and donate the same amount to the Oregon Cultural Trust!\*\*

# SCORE THE TAX CREDIT

Write the amount you matched to the Oregon Cultural Trust on your Oregon tax form to claim your tax credit.

\*\*NOTE: Maximum tax credit amounts are \$500 for individuals, \$1,000 for couples filing jointly and \$2,500 for class C-corporations.

#### **DONATE**

by mail using this form online at culturaltrust.org by phone at 503-986-0088

# MAKE CULTURE COUNT



culturaltrust.org

# I'm supporting Oregon's arts, heritage and humanities with my contribution of:

\$25	\$100	□ \$500	□ \$1,000	S1,500	□ \$2,500	Other		
CREDIT CAR	RD NUMBER o	or ENCLOSED (	CHECK		EXP. DATE		SECURIT	Y CODE
DONOR NAM	ME(S)							
ADDRESS					CITY		STATE	ZIP
PHONE			EMAIL	. (NEW OR UPDAT	red)			

Mail this form with your credit card info or check payable to the Oregon Cultural Trust to: Oregon Cultural Trust, 775 Summer Street NE, Suite 200 | Salem, OR 97301

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PHONE			EMAIL	. (NEW OR UPDA	ΓED)			

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#### December 20, 2023

TO: Cultural Trust Board Members

FROM: Brian Rogers, Executive Director

SUBJ: Executive Director Report

#### Legislative Update:

The short session is from February 5, 2024 to March 10, 2024. The Cultural Trust will seek to have an administrative fix to add spending limitation. House Bill 3532 enables the Trust to allocate a percentage, up to 5%, of the permanent fund. The Trust currently uses a base amount of \$400,000 plus an additional U.S. City Average Consumer Price Index.

The Cultural Advocacy Coalition will advocate for the remaining 14 remaining capital construction projects. The projects add up to \$7.8 million. Two projects were funded, Native Arts and Culture Foundation \$3 million and Literary Arts \$1 million. The construction projects can be found at the following link: 2023-25 Endorsed Capital Projects (oregonculture.org)

The Arts and Culture Caucus is currently on hiatus but will reconvene in late September. We are also looking into tours of cultural organizations in different communities for legislators. Summary of other legislative requests 2023-2025

#### Preparing for 2025-27 Session

- Cultural Trust tax credit sunsets on 12/31/2027. We will prepare a process and timeline to submit a POP to extend six years.
- Also seeking to increase the cap amounts for individuals (\$500) and joint filers (\$1,000), possibly double or more.
- Arts Commission seeking to increase the General Fund Amount. Currently \$4.2 million, would like to increase by \$10 million. Oregon is currently ranked 41<sup>st</sup> in nation, we have not seen an increase in 23 years. Will submit POP, including the business case and outcomes.
- Arts Commission Percent for Art- modernize the administrative allocation and create a maintenance and conservation budget.

#### National Assembly of State Arts Agencies

Liora and I attended the NASAA Executive Forum in Santa Fe from December 4 through 6, 2023. The Executive Directors and Deputy Directors for State Arts Agencies (SAAs) and Regional Arts Organizations (RAOs) attended. Attached is the agenda. I attended the following break out session,

Changes in the Creative Sector, Nurturing Statewide Advocacy Organizations and Maximizing Capacity in Small Agencies.

The Executive Directors and Deputy Director groups each had sessions. The Executive Directors discussed topics such as advocacy, staffing, program review, and NEA and RAOs relationships.

#### Other Items

- The Cultural Trust is in the final phase of the fall donation campaign.
- Welcomed the Arts NW Conference on October 17<sup>th</sup>, the conference is for arts presenters and preforming artists.
- The staff had a team day at <u>Hopscotch | Immersive Art Experience (letshopscotch.com)</u> on October 18<sup>th</sup>.
- Attended the Western States Arts Federation (WESTAF) Board of Trustees meeting October 23 through 25 in Denver.
- Attended the Art Talk hosted by Portland City Commissioner Dan Ryan on October 11.
- Spoke at the Lincoln City Cultural Center Grand Plaza opening on November 18.
- Attended the Red Door Project's Evolve Experience first ever screening of monologues. The
  monologues have been recorded since 2020. "The Evolve Experience is a unique arts-based
  workshop built around first-person narratives from police officers, judges, and Black
  community members describing their lived experiences at the intersection of race and the
  justice system."

Requested Action:		
	For board input/discussion	For board action



# **2023 NASAA Executive Forum**

# **Agenda and Session Descriptions**

09/12/2023

The NASAA 2023 Executive Forum agenda focuses on priority issues facing executive and deputy directors in their public-sector leadership roles. The program equips state arts agencies to succeed in navigating complex issues such as:

**Today's Policy Environment:** Identify emerging policy trends affecting state arts agencies as well as strategic partnerships that can strengthen our work.

**Serving All Constituents:** Exchange ideas for the design of responsive programs and ways of reducing barriers to support.

**Funding Practices:** Learn about grant-making innovations, panel adjudication practices, legislative earmarks and more.

**Management:** Find out how your colleagues in other states are coping with workforce shortages and staff burnout while building resilient staff teams.

**Emergent issues:** The agenda allows opportunities for discussion of topics that arise organically from the group and have timely relevance to participants.

# **NASAA 2023 Executive Forum Agenda**

as of 09/08/23

# **Monday, December 4**

8:30 a.m. – 4:30 New Executive Directors Roundtable

p.m.

This invitation-only session is tailored to the needs of recent appointees and interim executive directors. Sessions address transition dynamics and priority issues for new/interim leaders. Breakfast and lunch are included.

6:00 – 7:30 p.m. **Opening Reception** 

# **Tuesday, December 5**

Morning Breakfast on your own

9:00 – 11:00 a.m. **Morning General Session** 

Welcome to NASAA's new executive leadership forum! After welcomes from NASAA's CEO, New Mexico Arts and the meeting facilitators, introductions and small-group conversations will connect us and help us understand the issues we face as a field.

11:00 - 11:15 a.m. **Break** 

11:15 a.m. – 12:15 **Topical Sessions (Part I of III)** 

p.m.

**Cross-Sector Partnerships:** This session explores collaborations—within and outside of state government—as a strategic way to amplify our impact, respond to community needs and expand support for the arts.

**Changes in the Creative Sector:** While some parts of the arts ecosystem "returned to normal" following the COVID-19 pandemic, others are undergoing permanent shifts. What trends do you observe, and how should state arts agencies respond to these shifts?

**Access for All:** This session explores ways state arts agencies are ensuring that their programs and services facilitate access to

resources, respond to local conditions and comply with new state policies.

**Line Items:** Some arts organizations secure their own earmarked funding from state legislatures, outside of the state arts agency grant process. What are the implications of these line items?

**Create Your Own Breakout:** Do you have a timely issue not covered elsewhere on the agenda? Share your topic and invite colleagues to join you for a self-directed jam session.

# 12:15 – 1:30 p.m. **Lunch**

Your forum registration includes a luncheon buffet. No program is planned, allowing you to meet informally with colleagues and stretch your legs before the afternoon sessions resume.

# 1:30 – 2:30 p.m. **Topical Sessions (Part II of III)**

**Rethinking Grant Making:** Many state arts agencies are evaluating legacy programs and making alterations to their grant portfolios. This session explores shifts to grants policies and practices as well as funding formulas.

**Working with Citizens Groups:** Citizens groups can have a large impact on cultural policy at the state level. Discuss the changing landscape of these groups and share strategies for establishing effective working relationships.

**Building Stronger Councils:** How can state arts agencies orient appointees, support their engagement, and help council members to understand that they are not a board of directors? Feel free to bring materials (such as orientation packets, policies, etc.) to share during this session.

**Staff Resilience and Cohesion:** The last few years have created staff management challenges unknown to previous generations of state leaders. How can we work with our teams to support each other in healthy and productive ways?

**Create Your Own Breakout:** Do you have a timely issue not covered elsewhere on the agenda? Share your topic and invite colleagues to join you for a self-directed jam session.

2:30 – 2:45 p.m.	Break
2:45 – 3:45 p.m.	Topical Sessions (Part III of III)

**Maximizing Capacity for Small Agencies:** Small state arts agencies face acute constraints in pursuing ideas with limited staffs and budgets. What are some ways that small states are coping with capacity limitations?

**Working with Authorizers:** This session, offered in response to requests from members, offers a supportive space in which to discuss challenges, vulnerabilities and strategies for success in working with governors and legislatures.

**Rethinking Grant Panels and Adjudication:** What changes are you making to grant panels or adjudication practices? When are panels important, and are there situations where panels can be abandoned altogether? Bring all your ideas for reinventing adjudication to this freewheeling panel session.

**New Frontiers:** This session is designed to showcase innovative approaches being led by state arts agencies around the country.

**Create Your Own Breakout:** Do you have a timely issue not covered elsewhere on the agenda? Share your topic and invite colleagues to join you for a self-directed jam session.

3:45 - 4:00 p.m. **Break** 

4:00 – 4:15 p.m. **Day One Wrap-up** 

Evening Dinner and evening activities on your own

# Wednesday, December 6

Morning Breakfast on your own

9:00 – 9:15 a.m. **Reconvene** 

9:15 – 9:30 a.m. **Break** 

9:30 a.m. - 12:30 **Peer Groups** Executive directors and deputy/assistant directors gather in separate p.m. groups. Peer groups utilize Open Space Technology to flexibly determine discussion topics. 12:30 – 1:30 p.m. Lunch Your forum registration includes a luncheon buffet. No program is planned, allowing you to meet informally with colleagues and stretch your legs before the afternoon sessions resume. 1:30 - 3:30 p.m. Reimagining the Future of State Arts Agencies All forum participants reconvene for an energizing session to imagine the future of state arts agencies together. This closing session also includes a wrap-up and reflections on key take-aways from the forum. 4:00 - 5:00 p.m. **Museum Tours** Dinner and evening activities on your own