

Oregon Cultural Trust Board Meeting Thursday, February 27, 2025 9:00am to 12:00pm

Join Zoom Meeting https://oregon4biz.zoom.us/j/84977782786?pwd=CkAi1l2sOxUXcX6gabStUl3TLvPINJ.1

Meeting ID: 849 7778 2786 Passcode: 996547 One tap mobile +13462487799,,84977782786#,,,,*996547# US

Meeting Schedule:

Monday, April 14, 2025 Joint Meeting with Arts Commission

Type: In Person Time: 10:00am to 1:30 pm Location: Salem Major Topic: Joint Meeting with Cultural Trust Community Reception, Dinner

Tuesday, April 15, 2025 Arts Advocacy Day

Time: 8:00am to 1:00pm Location: State Capitol Building

August 20 and 21, 2025 Board Meeting

Type: In person Location: Hold for Bend Major Topic: act on budget and grants

> Wednesday 8/20 4:30pm to 6:00pm Community Reception, 6:30 Dinner

Thursday 8/21 Board Meeting 9:00am to 1:00pm

October 16, 2025 Board Meeting

Type: Virtual Time: 9:00am to 12:00pm Major Topic: campaign check in

February 26, 2026 Board Meeting

Type: Virtual Time: 9:00am to 12:00pm Major Topic: fall campaign results Oregon Cultural Trust Board Meeting Agenda



Thursday, February 27, 2025 9:00 to 12:00pm Virtual Zoom Meeting

Zoom https://oregon4biz.zoom.us/j/84977782786?pwd=CkAi1l2sOxUXcX6gabStUI3TLvPINJ.1

		9:00 AM	Welcome and Introductions	Sean Andries, Chair
1	Action Page 8 &11	9:10 AM	Minutes: October 03, 2024 December 10, 2025	Sean Andries
2	Discussion Page 13	9:15 AM	Working Group (Semi-Independent and Merger) Update and Discussion	Sean Andries and Brian Rogers, Executive Director
3	Information Page 19	10:00 AM	Fundraising/Campaign Results	Raissa Fleming, Grants Officer and Carrie Kikel, Communication Manager
4	Information Page 26	10:20 AM	Cultural Ambassador Network Launch Report	Carrie Kikel and Brie Stoianoff, Ambassador
5	Break	10:35 AM	Break	
6	Information Page 34	10:40 AM	Grant Program Update	Aili Schreiner, Trust Manager
7	Information Page 92	11:00 AM	Strategic Plan Update	Aili Schreiner
8	Information Page 98	11:20 AM	Executive Director Report and Legislative Update	Brian Rogers, Executive Director
9	Information Page 105	11:35 AM	Cultural Trust Partners Update	See Below for Partners
10	Discussion	11:55 AM	Public Comment	
11	Action	12:00 PM	Adjourn	Sean Andries

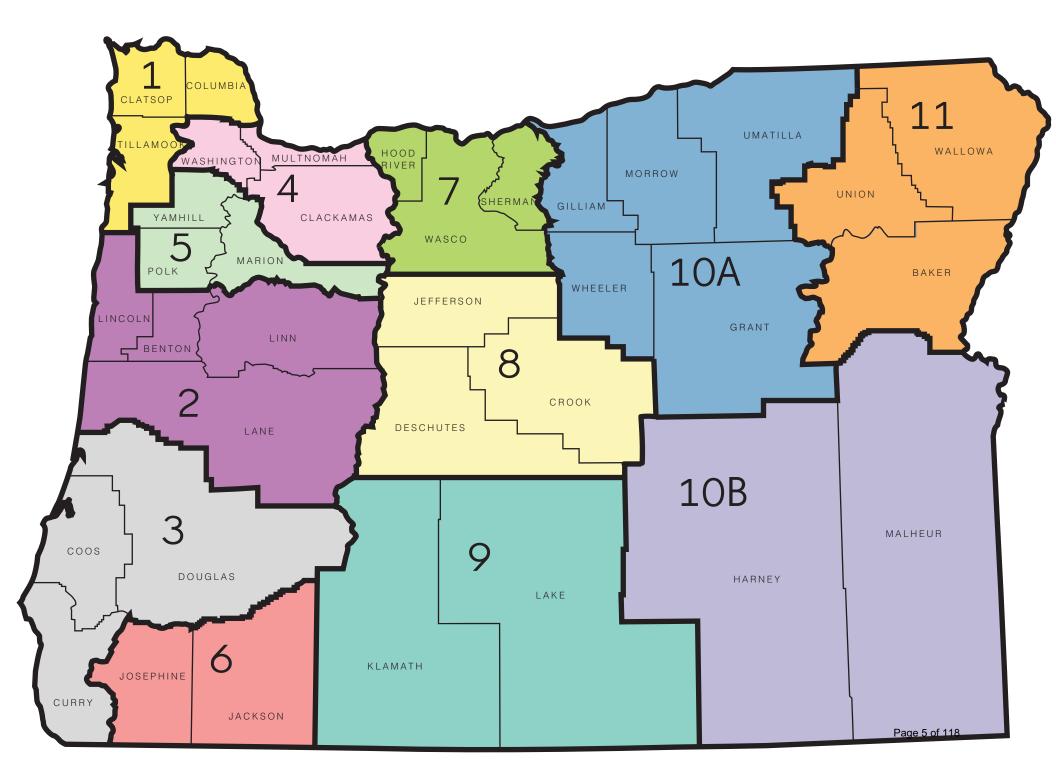
Oregon Cultural Trust Partners

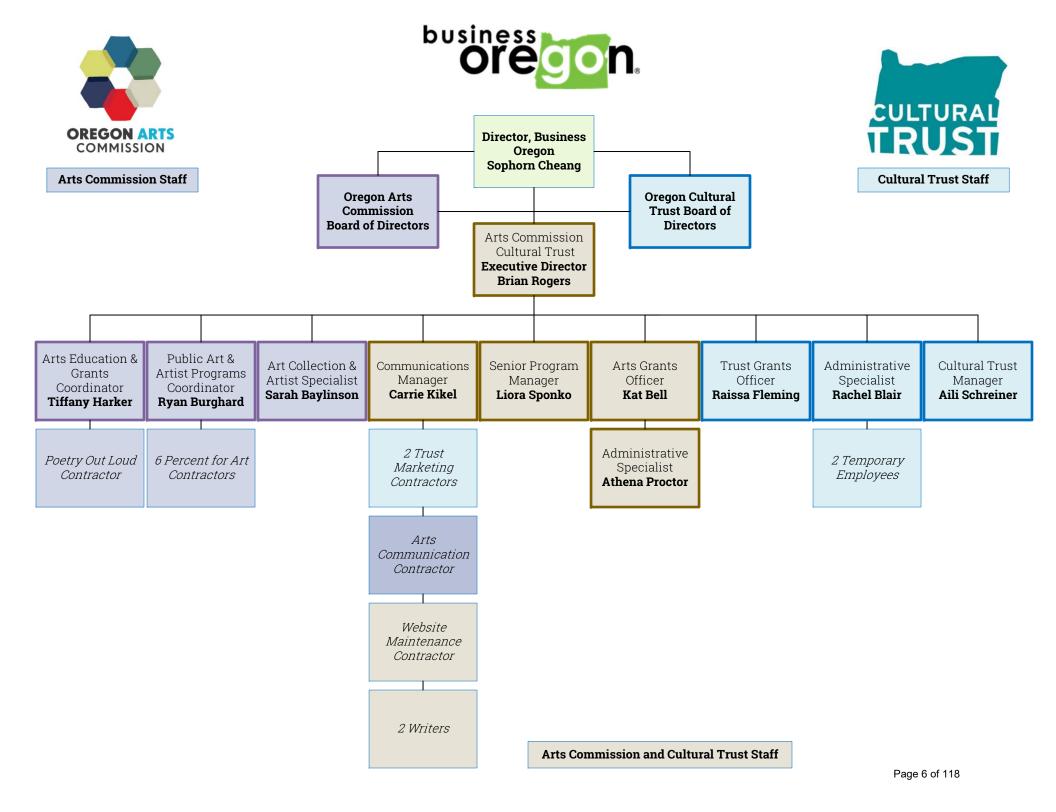
Oregon Arts Commission	Subashini Ganesan-Forbes, Chair Oregon Arts Commission
Oregon Heritage Commission	Katie Henry, Heritage Commission Coordinator
State Historic Preservation	
Office	Kuri Gill, Heritage Grant Coordinator
Oregon Humanities	Adam Davis, Executive Director
Oregon Historical Society	Eliza 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 enh		nulating creativity, leadership	ough To lead in building an environment in which co and organizations are sustained and valued as a co ality vibrant Oregon communities.	re part of	ULTURA
OREGON ARTS COMMISSION		Ove	rview/Purpose		RUST
 Policy development and a Official state arts agency Grantmaking Advocacy 	,	nment on programs related to oment, Arts Education, % for Ar	 Fund development Grantmaking Advocacy 	ent on progra	ms related to
		q	Governance		
9 Member	s Appointment l	by the Governor	11 Members Appointed by the Governor, 1 House Member; 1 Senat		the Senate
FT	E	Budget	Budget	FTE	
4.5 Admin & 7 Contract (Percent for A		t Loud) \$4,074,681 (1Executive Director\$4,659,4183.5 Fund Developmen 2 Temps, 3 Contract		
		Rev	venue sources		
Percent for Art	Foundation	Services &	Technical Assistance		Earnings n Leadership
Percent for Art		•	ch • Online Resources • Communications	Coantion	Leadership
Office + Technology + Fin			ared Services		and 60 E10 Z20
Office + Technology + Fin	ancial • Contrac		inistrative • Communication Staff • Cultural Resourc	e Economic Fi	and \$9,510,728
		Fiscal Year 2023:	July 1, 2022 – June 30, 2023		
			Program	Amount	
Program	Amount		Cultural Development	\$ 1,706,828	
Arts Access Reimbursement	\$ 15,325		Coalitions	\$ 855,687	
Arts Build Communities	\$ 255,000	Artists &	Cultural Partners		
		Projects	Oregon Arts Commission	\$ 228,183	FY23
Arts Learning	\$ 240,000			\$ 76,061	
•	\$ 240,000 \$ 109,053	32%	Oregon Heritage Commission		Donations
Career Opportunity		32%	Oregon Historical Society	\$ 76,061	Donations \$5,133,872
Career Opportunity Designated	\$ 109,053	32% Operating	Oregon Historical Society Oregon Humanities	\$ 76,061 \$ 228,183	
Career Opportunity Designated Fellowship	\$ 109,053 \$ 60,000	32%	Oregon Historical Society Oregon Humanities State Historic Preservation	\$ 76,061 \$ 228,183 \$ 76,061	
Career Opportunity Designated Fellowship Operating Support	\$ 109,053\$ 60,000\$ 63,000	32% Operating	Oregon Historical Society Oregon Humanities	\$ 76,061 \$ 228,183	
Arts Learning Career Opportunity Designated Fellowship Operating Support Small Operating Total	 \$ 109,053 \$ 60,000 \$ 63,000 \$ 1,267,496 \$ 318,000 	32% Operating	Oregon Historical Society Oregon Humanities State Historic Preservation Poet Laureate Oregon Travel Information Council	\$ 76,061 \$ 228,183 \$ 76,061	
Career Opportunity Designated Fellowship Operating Support Small Operating	 \$ 109,053 \$ 60,000 \$ 63,000 \$ 1,267,496 	32% Operating	Oregon Historical Society Oregon Humanities State Historic Preservation Poet Laureate	\$ 76,061 \$ 228,183 \$ 76,061 \$ 40,000 \$ 35,000 \$ 67,810	

Revised 08/04/2023





Arts Commission Meetings are Red

Cultural Trust Meeting Are Blue

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MAY

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NOVEMBER											
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DECEMBER				Virtual		
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DRAFT: Oregon Cultural Trust Board Meeting Minutes

October 3, 2024

Virtual

Board Members Present: Sean Andries, Chair; George Kramer, Vice-Chair; Rep. John Lively; Myong-Hui Murphy; Niki Price; Deb Schallert, Gayle Yamasaki

Board Members Absent: Nathalie Johnson; Bereniece Jones-Centano; Gustavo Morales; Sen Bill Hansell

Staff Present: Kat Bell, Grant Officer; Raissa Fleming, Trust Assistant; Carrie Kikel, Communications Manager; Athena Proctor, Administrative Specialist; Brian Rogers, Executive Director; Aili Schreiner, Trust Manager; Liora Sponko, Senior Program Manager

Partners Present: Eliza Canty-Jones, Oregon Historical Society; Chrissy Curran, State Historic Preservation Office; Adam Davis, Oregon Humanities; Subashini Ganesan-Forbes, Oregon Arts Commission; Katie Henry, Oregon Heritage Commission

Others Present: Emily Hartlerode, Oregon Folklife Network; Emily Waterston, Oregon Poet Laureate

Call to Order

Andries called the meeting to order at 9:03 am.

Minutes

Murphy moved approval of the minutes from the August 22, 2024, meeting. Seconded by Schallert. Price abstained. Motion carried.

Campaign, Fundraising Update

Kikel presented report. Yamasaki said she has been putting out the cards thanking people for buying the Trust license plate.

Ellen Waterston, Oregon Poet Laureate

Waterston thanked all involved in the developing and maintaining the Poet Laureate program. She offered the poem "The River Only Says Things Once."

Hartlerode asked if other states have a poet laureate program. Waterston responded that all but three have one.

Executive Director Report and Legislative Update

Rogers presented report. He asked Andries to comment about the most recent meeting of the Joint Committee for Studying Arts and Culture.

Andries said the committee has decided moving forward is still a good idea. He listed the items the committee is thinking about.

- Creating a new semi-independent entity.
- Outlining the four major pillars of the Oregon Arts Commission that need to be preserved.
- Ensuring the Oregon Cultural Trust account and endowment are protected.
- Maintaining the visibility of the Oregon Cultural Trust brand.
- Preserving the funding and unique programming of the Oregon Cultural Trust, especially as it relates to tribal and coalition granting.
- Creating a shared board whose membership is targeted to ensure representation of the Partners and with defined roles, so arts and culture are protected.
- Using the next two years to work out the logistics of creating the new entity.

Kramer added they were able to ask Tim Williams from Oregon Film and Video about their relationship with Business Oregon.

Schallert added they also got clear direction from the Governor's office that is process go through as a joint effort and to ensure both organizations benefit.

Ganesan-Forbes added that the Oregon Arts Commission status as a state arts agency remain intact to ensure they are still eligible for grants from the National Endowment of the Arts.

Yamasaki asked if there was a timeline. Andries dropped one in the chat:

Rough timeline for Next Steps, assuming OAC/OCT and legislative support:

- October 3: OCT Board meeting: Committee to provide an update to the full board.
- October 18: OAC meeting Committee to provide an update to the full board.
- November and December: If boards agree to continue moving forward, the Joint Committee will meet two more times working with Business Oregon and Legislative Council to support a bill draft.
- December: OAC and OCT to hold special meetings to confirm through a vote whether to proceed with a legislative concept. Determine how the Joint Committee will monitor and participate in the legislative process.

- January-July, 2025: Legislative process.
- August 2025-December 2026: Determine governance and operationalize.
- January-July, 2027: Legislative process.
- August 2027: The new semi-independent entity is formed.

Schreiner asked if one org, one set of staff, one board is what was decided one. Andries said they are leaning to not a joining but a new organization that would do both things.

Yamasaki asked if for clarification that the partners would have a seat on the board. Andries yes. Curran would the partners change. Kramer said no because the govs office wants this to be fiscal neutral. Schallert said they also discussed that they want to hear from staff.

Rogers continued reporting.

Oregon Folklife Network Update

Hartlerode presented report [Attachment A].

Cultural Trust Partners Update

Davis presented the Oregon Humanities report.

Canty-Jones presented the Oregon Historical Society report.

Henry presented the Oregon Heritage Commission report.

Curran presented the State Historic Preservation Office report.

Ganesan-Forbes presented the Oregon Arts Commission report. Sponko discussed the Arts and Economic Study tour she did with Randy Cohen with Americans for the Arts.

Public Comment

There was none.

Adjourn

Andries adjourned the meeting at 11:50 am.



DRAFT: Oregon Cultural Trust Board Meeting Minutes

December 10, 2024

Virtual

Board Members Present: Sean Andries, Chair; George Kramer, Vice-Chair; Myong-Hui Murphy; Niki Price; Deb Schallert, Gayle Yamasaki

Board Members Absent: Nathalie Johnson; Bereniece Jones-Centano; Gustavo Morales; Sen Bill Hansell, Rep John Lively

Staff Present: Kat Bell, Grant Officer; Raissa Fleming, Trust Assistant; Athena Proctor, Administrative Assistant; Brian Rogers, Executive Director; Aili Schreiner, Trust Manager; Liora Sponko, Senior Program Manager; Carrie Kikel, Communications Manager.

Partners Present: Eliza Canty-Jones, Oregon Historical Society; Chrissy Curran, State Historic Preservation Office; Adam Davis, Oregon Humanities; Subashini Ganesan-Forbes, Oregon Arts Commission; Kuri Gill, State Historic Preservation Office; Katie Henry, Oregon Heritage Commission.

Others Present: Jennifer Allen, Miller Foundation; Yaelle Amir, Miller Foundation; Paulianne Balch-Rancourt Curry County Cultural Coalition; Rebecca Bond, Albany Visitors Association; Rachel Browning, Restore Oregon; Chi-Chao Chen, Portland-Kaohsiung Sister City Association; Mark Gharst, Business Oregon; Timothy Hecox, Oregon Museums Association; Tom Jay, Crook County Cultural Coalition; Leslie Kay, Multnomah County Cultural Coalition; Bonnie Kraxberger, Maestro Music; Buzzy Nielsen, Oregon State Library; Cate O'Hagan, Deschutes County Cultural Coalition; Amelia Porterfield, Regional Solutions Director, Office of Governor Tina Kotek; Michelle Reynolds, Miller Foundation; Catherine Rickbone, Cultural Advocacy Coalition of Oregon; Prudence Roberts; Norm Smith, Oregon State Capitol Foundation; Andrea Tichy, Cultural Coalition of Washington County; Lauren Waudé, Collins Foundation; Michelle Woodard, Travel Oregon

Call to Order

Sean Andries called the meeting to order at 3:04 pm.

Joint Committee for the Future of Arts and Culture

Andries presented report. George Kramer discussed the process. Subashini Ganesan-Forbes provided comments.

Motion: To approve the Oregon Arts Commission and Cultural Trust Merger and Semi-Independence Framework to be the basis for legislative bill drafting instructions.

Myong-Hui Murphy; seconded by George. Aye votes: Sean Andries, Chair; George Kramer, Vice-Chair; Myong-Hui Murphy; Niki Price; Deb Schallert, Gayle Yamasaki

Public Comment

The following provided comment:

- Cate O'Hagan
- Rachel Browning
- Catherine Rickbone
- Norm Smith
- Chi-Chao Chen

Adjourn

Andries adjourned the meeting at 3:47 pm.



February 27, 2024

TO:	Cultural Trust Board Members
FROM:	Brian Rogers, Executive Director
SUBJ:	Working Group (Semi-Independent and Merger) Update and Discussion

We have been conducting a series of Stakeholder Information Sessions to update people on the process we are engaged in to become semi-independent and merge the Arts Commission and Cultural Trust boards. Sean Andries, Arts Commission Chair Subashini Ganesan-Forbes and Brian Rogers have been leading these Stakeholder sessions.

Sean, Suba and I also presented to the <u>Economic Development, Small Business, and Trade House</u> <u>2025 Regular Session</u>. This hearing was dedicated to arts and culture. In addition to hearing from us regarding HB3048, they heard testimony on three other bills. Attached is the agency's testimony. And here is a link to the <u>HB3048 presentation</u>.

Stakeholder groups we have met with:

- House Committee on Economic Development, Small Business and Trade, Hearing
- Arts and Culture Organizations, Artists 3 separate sessions
- Business Oregon Commission
- Cultural Advocacy Coalition of Oregon 2 sessions with board members
- Arts Service Organizations
- Communication/marketing contractors
- Previous Arts Commissioners and Cultural Trust board members
- Media Arts Watch and Oregonian
- County and Tribal Coalitions

Upcoming Stakeholder Information Sessions:

- Additional session for Arts and Culture Organizations and Artists
- Percent for Art Project Managers
- Joint Ways and Means Committee
- Additional Media
- Other Semi-Independent Agencies
- Cultural Trust Ambassadors

HB3048 is currently a placeholder bill; legislative counsel is drafting an amendment based on the framework developed by the Working Group that was approved by both boards. As of 2/21/2025 the amendment has not yet been submitted.

Requested Action:

🗌 Informational only 🖾 For board input/discussion 🗌 For board action

HB 3048 - Arts Commission and Cultural Trust Merger and Semi-Independence

The Oregon Arts Commission (Commission) and Oregon Trust for Cultural Development (Trust), currently housed in the Oregon Business Development Department (Department), have jointly determined that they would be better situated to fulfill their respective goals if they were to combine boards and become a semi-independent state agency with a unified mission and the autonomy to pursue that mission. Becoming a semi-independent state agency and merging the two boards would enable greater autonomy and efficiency in providing grants and services that reach almost all Oregon communities.

The Department has been working with the Governor's office and a workgroup composed of Commission and Trust leadership. The goal of the group has been to reach agreement on what a combined semi-independent organization would look like, with the goal of introducing an early session amendment to HB 3048 that would not become operative until the 2027-29 biennium. The Department would then work with Commission, Trust, and the Chief Financial Office over the 2025-27 biennium on setting the new organization's budget and operational structure and effecting the change to semi-independence on July 1, 2027.

The workgroup has been very productive and has focused on a proven model that looks very similar to the Oregon Film and Video Office (Oregon Film). The group created a framework document (see attachment) that was approved unanimously by the full memberships of the Commission and Trust Board in December 2024. A "gut and stuff" amendment to HB 3048 that rewrites large portions of ORS 359 in alignment with the framework is currently being drafted by Legislative Counsel.

The creation of a new semi-independent agency will be able to prioritize arts and culture in a way that is not possible within a larger agency:

- A combined board will enhance efforts to raise the profile of arts and culture and will eliminate confusion between grant makers,
- A semi-independent organization will strengthen the ability of the community to direct resources, including staffing, and will enhance budgetary flexibility to be nimble and make best uses of resources,
- The new model will provide a streamlined, focused, direction with one strategic plan, a unified work plan, and increase efficiency with fewer board meetings, and
- It will provide the ability to seek cost effective solutions for operations and services (e.g. bookkeeping; financial reporting; accounts payable; billing; human resources; payroll/benefits; IT systems and services; and purchasing and contracting).

Attachment: Merger and Semi-Independence Framework approved by Commission and TrustContact: Mark Gharst, 503-991-2192 or mark.gharst@biz.oregon.govFebruary 17, 2025

Oregon Arts Commission and Cultural Trust Merger and Semi-Independence

Below is a framework for combining the Oregon Arts Commission (Commission) and Trust for Cultural Development Board (Trust) into a new single board, and for the establishment of a new semi-independent state agency.

This framework is the consensus product of a workgroup made up of members of both organizations. If the framework is approved by the full Commission and Trust, it will be the basis of legislation to be proposed during the 2025 legislative session.

Timing

The plan as discussed retains the current Commission, Trust, and relationship with Business Oregon through the end of the 2025-27 biennium. The bill will put the described changes into statute at the point that the bill becomes effective (likely early October 2025), but the organizational changes are not operative until July 1, 2027.

The Commission, Trust, and Arts Program of Business Oregon (Arts Program) will be directed to report back to the Legislature by a set date with any recommendations for legislative changes to assist in the transition, improve operations, streamline program administration, and so on.

The Commission and Trust will also work with Business Oregon Arts Program staff, the Governor's Office, the DAS Chief Financial Office, and the Legislative Fiscal Office to develop the necessary budgetary changes for the 2027-29 biennium to make the move out of Business Oregon and into a new semi-independent entity.

The New Board

Beginning on July 1, 2027, both the Oregon Arts Commission and Trust for Cultural Development Board are dissolved. The Oregon Arts and Cultural Development Board (Board) is established with responsibility for oversight and fiscal accountability of the Oregon Arts and Cultural Development Office (Office).

- The new Board consists of 11 members appointed by the Governor, Senate confirmation is *not* required.
- Current members of the Commission and Trust will be eligible for membership on the Board.
- The membership of the Board must reflect the geographical and cultural diversity of the state.
- Membership shall include at least one member with expertise in each of the following areas: heritage, historic preservation, humanities, arts, and museums.

- The House Speaker and Senate President shall each appoint a legislator to be a nonvoting advisory member.
- Terms are 4-years, staggered, and members may serve two full terms. Members serve at the pleasure of the appointing authority. Members shall serve until a successor is appointed and qualifies.
- The Board shall elect a Chair and Vice Chair for such term and with duties and powers necessary to perform the functions of the office as the Board determines.
- Duties of the Board include any applicable duties currently in statute for the Commission and Trust, including policy development and the review and approval of certain grants and disbursements.
- New duties of the Board are modeled after the Oregon Film and Video Office (Oregon Film), and include responsibility for appointment, compensation, and administrative control of the Director of the Oregon Arts and Cultural Development Office; approval of the Office budget; and approval of certain financial transactions, including any expenditures over \$25,000.

The New Semi-Independent Agency

Beginning on July 1, 2027, the Arts Program of Business Oregon is dissolved. The Oregon Arts and Cultural Development Office is created as a semi-independent state agency with responsibility for administration of the work previously managed by the Arts Program.

The Office is a semi-independent agency in the model of Oregon Film and the proposed bill language will borrow heavily from ORS 284.300 to 375 for powers of the agency, division of authorities with the Board, budgetary procedures, required reports, and so on. The Office will *not* generally be subject to the semi-independent state agency statutes found in ORS 182.454 to 182.472.

- The Oregon Arts and Cultural Development Office is under the administrative control of a Director, who is appointed and overseen by the Oregon Arts and Cultural Development Board. The Director will have broad latitude for the day-to-day operations of the Office, including program administration and human resources, but will report to the Board.
- The Office will receive pass-through General Funds through the biennial Business Oregon budget, following the model of how Oregon Film currently receives Lottery Funds. The bill will include language acknowledging this continued obligation but cannot specify a funding amount (see ORS 284.305).
- Duties of the Office include applicable duties currently in statute for the Arts Program and Trust for Cultural Development staff.

- Powers of the Office include a mix of applicable powers currently in statute for the Arts Program and language pulled in from the Oregon Film statutes. This includes the authority to adopt administrative rules.
- Budgeting for the Office follows the Oregon Film model (see ORS 284.365) and is subject to approval of the Board after a public notice period and public hearing.
- The Office shall file with the Governor, the Legislative Assembly and the Legislative Fiscal Officer a biennial report of the activities and operations of the Office. The report shall include a full and complete reporting of the financial activities and transactions of the Office during the biennium.
- The bill will borrow heavily from Oregon Film statutes in determining what other parts of statute apply to the new agency, including statutes for affirmative action, surplus property, debt collection, accounting, Oregon Secretary of State oversight, and so on.

Existing Funding Sources, Accounts, Programs, and Staff

The intent is that all existing funding sources, accounts, staff, and programs of the Arts Program of Business Oregon are retained and moved to the Oregon Arts and Cultural Development Office.

- As discussed above, the Office will receive pass-through General Funds through the biennial Business Oregon budget, following the model of how Oregon Film currently receives Lottery Funds. This state support will allow the Office to continue to receive Federal Funds from the National Endowment for the Arts. The bill will include language acknowledging this continued obligation but cannot specify a funding amount (see ORS 284.305).
- The Cultural Tax Credit and Celebrate Oregon! license plate programs will continue, but with administration through the Office. Visibility and brand of the Oregon Cultural Trust for fundraising and license plate promotion will be retained.
- The existing Arts Trust Account and Trust for Cultural Development Account (including any interest earnings and Trust Permanent Fund monies currently residing in the Oregon Intermediate Term Pool) are appropriated to the Office for the respective purposes currently described in statute for each account.
- All grantmaking programs and services of the Commission shall continue and be administered by the Office, including the following: Art in the Governor's Office, Arts Access Reimbursement (AAR) Grants, Arts Build Communities (ABC) Grants, Arts Career Opportunity Grants, Arts Operating Support Grants & Small Operating Support Grants, Arts Learning Grants, Governor's Arts Awards, Individual Artist Fellowship, Percent for Art, and Poetry Out Loud. The Board shall have responsibility for grant approval on programs where current statute requires approval by the Commission. Not

all programs appear in statute, and changes to administrative rule will be necessary for those programs to continue.

- All programs of the Trust shall continue and be administered by the Office, including the following: Cultural Coalition/Participation Grant, Cultural Development Grant, Cultural Partner Grants, and Oregon Poet Laureate. The Board shall have responsibility for grant approval on programs where current statute requires approval by the Trust. The "waterfall" distribution of funds to partners continues as currently described in statute, but the portion of funds currently dedicated to the Commission is directed to the new Office to fund arts programs. Not all programs appear in statute, and changes to administrative rule will be necessary for those programs to continue.
- The intent is that all Arts Program staff, including staff supporting the Trust, will transfer to the new semi-independent agency. Staff will continue to be PERS eligible and will have access to benefits comparable to what they currently enjoy. Staffing levels and compensation are a budgetary matter and will not be addressed in the bill, these issues will be managed going forward by the Director of the Office with oversight by the Board.



February 27, 2025

то:	Cultural Trust Board Members
FROM:	Raissa Fleming, Grants Officer, and Carrie Kikel, Communications
	Manager
SUBJ:	Campaign Results Calendar Year 2024

Campaign Results

For calendar year 2024, the Trust raised \$5,211,613 with 10,570 gifts. This compares to \$5,046,220 (with \$369,145 beguest removed from total) and 10,294 gifts in calendar year 2023, resulting in an increase of \$165,392 or 3.2%. Gifts were up by 276 or 2.6%.

The Trust's top 10 counties for total dollars donated in 2024 include:

- \$1,729,427 1. Multnomah
- 2. Lane \$750,681
- 3. Washington \$625,601
- 4. Clackamas \$412,021
- 5. Jackson \$340,589
- 6. Benton \$226,831
- 7. Marion \$217,325
- 8. Deschutes \$142,432
- 9. Yamhill \$112,386 \$81,675
- 10. Lincoln

The Trust's top 10 counties per capita donations:

1.	Benton	\$2.32
2.	Multnomah	\$2.16
З.	Lane	\$1.96
4.	Wallowa	\$1.62
5.	Lincoln	\$1.60
6.	Jackson	\$1.54
7.	Hood River	\$1.33
8.	Sherman	\$1.28
9.	Tillamook	\$1.14
10.	Wasco	\$1.09

The Trust's top 10 cities 2023-to-2024-year comparison:

2023 City	2023	2024 City	2024	\$ Change	%Change
2023 City	2023	2024 City	2024	ş cilaliye	%Change
Portland	\$1,982,532.00	Portland	\$2,046,721.51	\$64,189.51	3.2%
Eugene	\$625,121.10	Eugene	\$633,563.22	\$8,442.12	1.3%
Salem	\$213,699.40	Salem	\$219,726.16	\$6,026.76	2.8%
Corvallis	\$213,612.70	Corvallis	\$207,049.26	-\$6,563.44	-3.0%
Ashland	\$181,009.20	Ashland	\$188,415.02	\$2,443.87	1.4%
Beaverton	\$146,904.70	<mark>Lake</mark> Oswego	\$152,160.13	\$12,596.53	9.0%
<mark>Lake</mark> Oswego	\$139,563.60	Beaverton	\$143,323.03	-\$3,581.67	-2.4%
Bend	\$115,754.90	Bend	\$113,853.80	-\$1,901.10	-1.6%
Medford	\$85,659.96	Medford	\$92,778.25	\$7,118.29	8.3%

The Trust saw 926 new donor households in 2024, approximately 1,138 new donors (counting two for joint household). There were 1,846 lapsed donor households.

We had another nice year with Willamette Week's Give! Guide. The final total was \$552,349 representing a total of 2,228 gifts. We received 380 new donor households or approximately 485 new donors from Give!Guide.

Spring letter appeal to donors yielded 485 donations totaling \$286,674. Trust Year End appeal letter to donors yielded 935 donations totaling \$547,409.

How our donors donated:

- Online credit card donations: 5,081 at \$2,785,794
- Credit card donations phoned in or mailed: 333 at \$189,112
- Check donations: 2,751 at \$1,618,623
- Stock: 56 stock donations at \$48,742
- Special note: Father of family had each of his three children donate stock along with their donation for a total of \$2,414 after fees.

Other donation facts:

- Individual donors: 3,892 individuals made 4,453 donations at \$1,357,604.
- Joint or couple: 5,177 households made 5,896 donations at \$3,709,424.
- Corporate: 25 corporations gave \$38,678.
- Matching gifts: 95 totaling \$43,053
 31 companies gave matching gifts in 2024. Intel was the largest matching gift company at \$11,995 with 27 gifts. Nike followed with \$9,514 with 11 gifts. We had two new matching gift companies, Cisco and F5.
- Grants from charitable giving funds/accounts: 85 totaling \$64,178. Grants up 31 or \$23,916.
- Out-of-State Donations: 93 donations came in from outside of Oregon at \$35,380.

Trust Board, Staff and Partner Giving:

- 66.66% giving from Trust Board. Three Board Members did not give in 2024.
- 100% giving from Trust staff
- 55.55% giving from Oregon Arts Commission
- 85.71% giving from Oregon Arts Commission staff
- 40% giving from Partner Executive Directors.

Campaign Highlights

Creative Strategy

Watson Creative again led the creative and paid strategy for the campaign. Turell Group joined as our new campaign support services contractor. We began our campaign meetings in July – the earliest ever – and the team camaraderie and collaboration were instantaneous and remained incredibly supportive throughout the campaign.

Building on the success of last year's creative, we developed messaging and graphics to target three primary audiences: New donors; repeat donors; and lapsed donors. Once again the messaging evolved as we engaged, informed and sought to convert donors.

While we continued with the Make Culture Count tagline, much of the messaging used a testimonial approach, capitalizing on quotes from actual donors. Below are some examples.

- "Wish I'd started this years ago!"
- "It's a no brainer"
- "I'd NEVER forget the cultural tax credit"
- "I love how my donation supports so many groups!"
- "If you love arts and culture, Oregon is the place to live"

Campaign visuals included warm cultural photography and a color palette that expanded to include navy, warm orange and lapis. Watson also created a new "lock up" for the tagline arching over the Cultural Trust logo. We heard from several people that the visuals extended our brand to create new energy and engage new audiences.

<u>Website</u>

The adjusted creative informed changes to the website homepage and campaign landing pages. We redesigned the <u>online toolkit</u>. In addition, we revised the homepage header to create more urgency as the deadline approached. We also added 10 new funding impact stories to the blog posts.

Payment platform

We worked with Tyler Technologies to make some language and formatting adjustments to the payment platform which improved the payment process, but there is still a 34 precent drop-off rate; this will be a focus for early work this year.

Media Plan and Results

Our paid media once again included a blend of digital (60%) and traditional media. We invested in Google, Meta (Facebook/Instagram) and – for the first time, Reddit, where Watson had discovered conversations about the cultural ax credit and the license plate. Traditional media buys included OPB, Willamette Week Give!Guide, All Classical, Jefferson Public Radio, KLCC (Eugene) and Connected TV. Connected TV is the ads you see while streaming video content. Our total media spend was about \$117,000.

Our ongoing commitment to the Willamette Week Give!Guide included another winning Big Give Day prize, Create Oregon! It featured hands-on creative experiences at the <u>Sitka Center for Art and</u> <u>Ecology</u>, <u>Talent Maker City</u> and the <u>Josephy Center for Arts and Culture</u> in addition to lodging, dining and other cultural tickets.

Additional traditional media included Artslandia's annual publication on the performing arts, a fullpage ad in 1859 Magazine and a series of ads on ArtsWatch and in cultural nonprofit programs.

The digital advertising resulted in 65,415 visits to the website and 2,314 donations. Google Display performed the best, resulting in close to 47,000 website visits and 1,094 donations. Meta delivered 660.4 donations; Google Search delivered 295; and Reddit delivered 205. While Connected TV had almost 250,000 impressions, it delivered only 45 donations; it is a great awareness builder but doesn't deliver immediate conversions.

Board Presentations

Our PowerPoint presentation was completely rebuilt to align with the new creative. It was used to deliver more than 90 presentations, mostly led by Trust Manager Aili Schreiner and Dana Turell. All presentations were followed up with an emailed copy of the presentation and a request to share information with audiences.

Board presentations continue this year; it is our goal to offer them year-round and to expand the program to all cultural nonprofits, not just those receiving a grant in the current fiscal year.

Outreach to Tax Preparers

Turell Group designed a CPA/Tax Preparer campaign conducted via LinkedIn and a series of eblasts. The campaign drove tax preparers to a toolkit on our website with resources they could share with clients.

The paid November post on LinkedIn had 29,792 impressions and 215 clicks; the paid December post saw 30,187 impressions and 258 clicks. There were also eight organic posts that delivered several hundred additional impressions and a couple dozen clicks.

The October eblast had a 47.9 percent open rate and a 5.7 percent click through to the toolkit. November and December emails had a 39.1 percent and 41.6 percent open rates.

Giving Tuesday

For the first time, we invested funds in promoting Giving Tuesday and what we like to call "Cultural Trust Wednesday," encouraging donors to remember cultural organizations on Giving Tuesday and to match their donations to the Trust. We found the ads on Google had great engagement and helped to drive close to 100 donations while the Meta ads (Facebook, Instagram) resulted in only 13 donations. This will inform our approach for next year.

Banner placements

We produced three new banner designs reflecting arts, heritage and humanities. Banner placements included all major performing arts venues including P5, Reser, Hult, Tower (Bend), The Vault (Hillsboro), Elsinore (Salem), Lincoln City Cultural Center, Newport Performing Arts Center, Ross Ragland (Klamath Falls), Lakewood (Lake Oswego), Revolution Hall and Four Rivers Cultural Center (Ontario).

Social Media and Funding Impact Stories

We scheduled at least three posts per week throughout the course of the campaign. The most engaging posts celebrated grant projects through 10 funding impact stories by contract writer Max Tapogna. In addition, we developed and posted a year-end social campaign that included 16 testimonial-style graphic videos featuring Cultural Ambassadors and cultural nonprofit leaders.

Direct Mail

The appeal letter hit close to 12,000 mailboxes the week of Nov. 18 and the reminder postcard landed the week of Dec. 8. The messaging for both aligned with the new creative and PowerPoint approach to celebrating Oregon's unique cultural landscape.

<u>Cultural Ambassador Network</u> See separate report.

Requested Action:

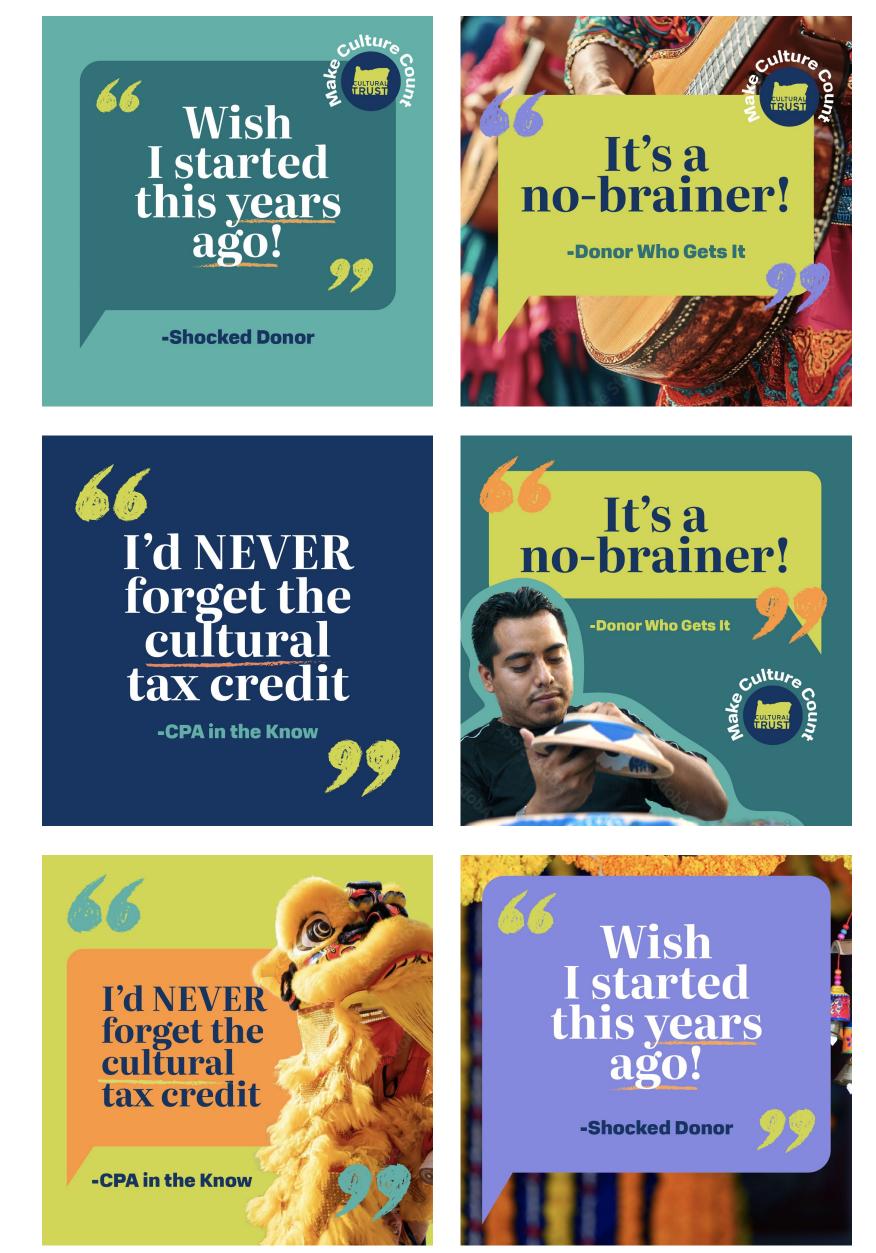
 \boxtimes

Informational only

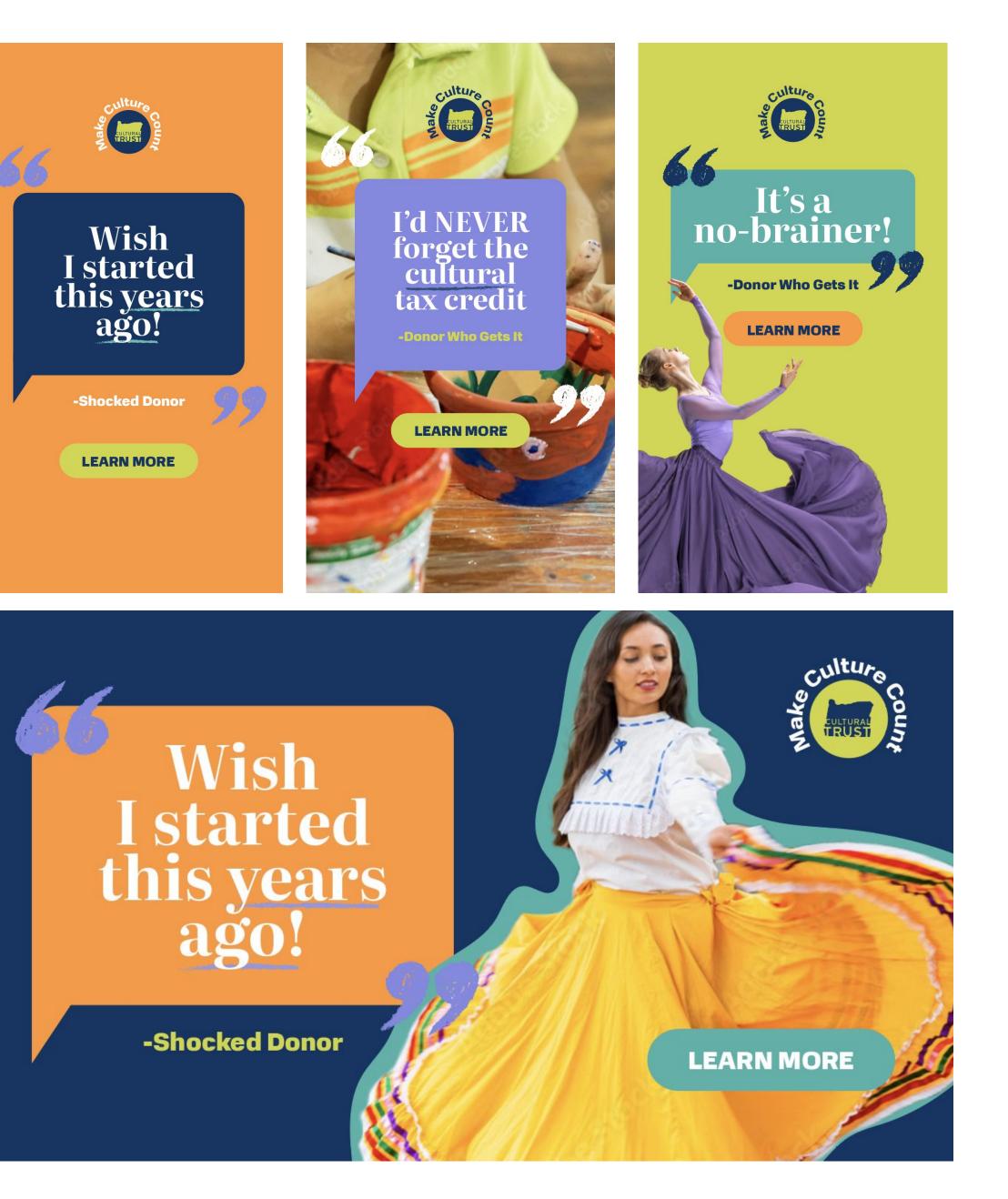
For board input/discussion

For board action





CAMPAIGN LOOK AND FEEL



2024 Year-End Campaign





Oregon's beauty reigns supreme. From its untamed and rugged coastlines to its towering forests and expansive deserts, every corner of our state is a visual masterpiece. But Oregon is so much more than breathtaking landscapes.

It's a canvas of **creativity, heritage and innovation.** Seen in everything from museums and festivals to storytelling and public conversations, **culture is the rhythm of human interaction.** Whether it's a lively parade or a quiet botanical garden, **culture shapes who we are and what makes us Oregonians.**

Since 2001, the Oregon Cultural Trust has **played a vital role in preserving and enriching our state's cultural resources, supporting more than 1,650 arts, heritage and humanities nonprofits.** Together, we weave a unique and awe-inspiring cultural tapestry, united by artistry, defined by stories and guided by wisdom.

Your matching gift to the Cultural Trust plays an exponential role in supporting cultural activities across our state. What makes Oregon truly special is this – for every matching dollar you donate to the Cultural Trust, you'll get a **dollar-for-dollar tax credit** when you claim it on your state taxes.*

Only Oregon offers a cultural tax credit for cultural donors! By leveraging your donations to arts, heritage and humanities nonprofits with the Cultural Tax Credit, you double your funding for culture.

Here's what the Cultural Tax Credit has made possible: **more than 10,000 grant awards totaling over \$40 million in support to nonprofits that are essential to our communities and our quality of life.** In fiscal year 2024, generous Oregonians increased their donations to the Cultural Trust by more than \$300,000. Please join us by making 2025 even greater!

By matching your cultural donations to the Cultural Trust, you maximize funding for Oregon's vibrant cultural network. You help foster innovation. You create equity and access where barriers exist. You empower creative initiatives. **You make culture count.**

Yours for culture,

Board members: Bereniece, Bill, Deb, Gayle, George, Gustavo, John, Myong-Hui, Nathalie, Niki and Sean **Staff members:** Aili, Brian, Carrie, Kat, Liora and Raissa

							>
I'm supp	orting Oreg	gon's arts, he	eritage and hi	umanities wit	h my contrib	ution of:	- 0
\$25	\$100	\$500	\$1,000	\$1,500	\$2,500	Other _	
NAME ON CREDI	T CARD	CF	REDIT CARD NUMBER (AM	EX, VISA, MC) or ENCLOSEI	D CHECK	EXP. DATE	SECURITY CODE
PHONE		EN	IAIL (NEW OR UPDATED)				
Mail to Ore	aon Cultural 1	rust. 775 Sumn	ner Street NE. Su	iite 310 Salem. (DR 97301 *M	Iaximum tax credi	t limits are \$500 for

Or donate online at Cultural Trust, 775 Summer Street NE, Suite 310 | Salem, OK 973

Maximum tax credit limits are \$500 for individuals, \$1,000 for couples filing jointly and \$2,500 for C- and S-class corporations.





Take your support of Oregon's arts, heritage and humanities to the next level. Make your **FULL** impact before December 31 in three easy steps:

1

Calculate

Add up all the generous donations you made to our 1,650+ qualifying cultural nonprofits this year.

2

Maximize

Donate up to 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.).

3

Claim

On your 2024 Oregon Tax Form, enter the donation amount you matched to the Oregon Cultural Trust to claim your tax credit.*

We thank you for making culture count!

P.S. If you have already donated this year, thank you! Please share with family and friends how you made culture count by doubling your impact and encourage them to do the same **before December 31!**

QUESTIONS?

Contact the Cultural Trust by phone **503-986-0088** by email **cultural.trust@biz.oregon.gov** or consult your CPA.

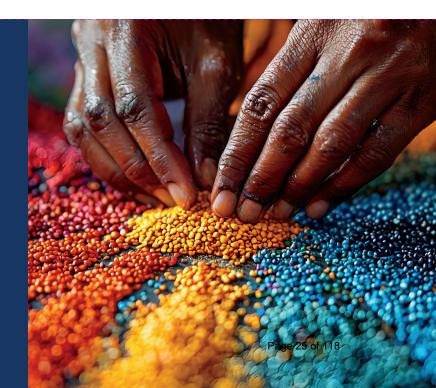
DONATE!

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

LEARN MORE

at **culturaltrust.org** or by scanning here







February 27, 2025

то:	Cultural Trust Board Members
FROM:	Carrie Kikel, Communications Manager
SUBJ:	Cultural Ambassador Network Launch Report

We have long dreamed of a statewide volunteer network to support the work of the Cultural Trust. In 2024 that dream became a reality with the development of the <u>Cultural Ambassador Network</u>.

While we hoped to enlist about a dozen volunteers to start, we were amazed and thrilled to have more than 50 cultural supporters respond to our call. Attention quickly turned to how we would welcome, onboard and train our new Ambassadors.

In late summer, we conducted an Ambassador orientation followed by three online training sessions. We sent each Ambassador background information and a welcome packet including an Ambassador nametag, a Celebrate Oregon! mug and collateral (donor inserts and color brochures) they could share with friends and contacts. We also shared our new PowerPoint presentation for use in speaking with groups and cultural boards.

Throughout the process it became clear we had recruited some of the Cultural Trust's biggest and most passionate fans – many of them have been promoting the tax credit for years. Several Coalition members, board members (thank you Bereniece, Niki and Sean!) and longtime donors are now Ambassadors – excited about being empowered to advocate for what they believe in so strongly. Norm Smith and Amy Cuddy, who both served on the Governor's task force to envision the Cultural Trust, are among the Ambassadors – as is Poet Laureate Emerita Paulann Petersen and former state Representative Margaret Doherty.

Our Cultural Ambassadors are:

Vanessa Abahashemi, Portland Katrina Anderson, Corvallis Sean Andries,* Dundee Stephanie Arnold, Portland Rebecca Bond, Albany Kristan Burkert, Portland Ronald Bush, Springfield Robert Canaga, Eugene Mary Carskadon, Woodinville (Washington) Lisa Chang, Aloha Gerald and Ruth Cohen, Lake Oswego Sandra Comstock, Portland Anne Conway, Portland Amy Cuddy, Ashland Margaret Doherty,* Tigard Denise Fairweather, Gearhart Walter Frankel,* Corvallis Jose Gonzalez, Portland Karen Hanken, Medford Sandy Hart, Portland Emily Hartlerode, Springfield Jeanette (Jenny) Hawkins, Wallowa Eric E. Hoem, Wilsonville Jamie Howe, Portland Tom Jay, Prineville Bereniece Jones-Centeno,* Astoria Maryhelen Kincaid, Portland Roberta Lavadour, Pendleton Erika Leppmann, Ashland Mikki Lipsey, Portland Gayle McMurria-Bachik/George Bachik, Keizer Matthew Miller, Portland Riley Moore, Portland Carole Morse,* Portland Ruth Obadal, Eugene Kelliane Parker, South Beach Paulann Petersen, Portland Niki Price,* Lincoln City Dr. Maureen Reed, Portland Jane Ridley, Portland Dr. Mary Kay Rudolph, Medford * Current or former Trust board member Isabel Sheridan, Portland Rosa Silver, Portland Norm Smith,* Roseburg Brie Stoianoff, Portland Ananthan Thandri, Portland Julia Triezenberg, Astoria PS (Vish) Vishwanath, Portland Jennifer Waters, Corvallis Rebecca Webb, Portland Betsy Williams, Eugene Carlee Wright, Salem

As we approached the fall campaign season, we asked Ambassadors to fill out a commitment form sharing how they planned to communicate about the Cultural Trust and the tax credit. Below is a sampling of their commitments.

- Committed to having conversations with at least 10 cultural donors: 8
- Encouraged local cultural nonprofits to promote the Cultural Tax Credit to donors: 13
- Worked creatively with the Trust team on unique opportunities for promotion: 6
- Presented a Trust-provided PowerPoint at cultural nonprofit board meetings or events: 9
- Presented to local service organizations about the Cultural Trust and the Cultural Tax Credit: 4
- Hosting a social gathering at which Cultural Trust information is shared: 3
- Connected with local media to share stories of Cultural Trust funding impact: 5
- Talked with tax preparers or CPAs about encouraging clients to use the Cultural Tax Credit: 3
- Connected the Cultural Trust team to other potential Ambassadors/local thought leaders: 3

Many of the Ambassadors work or volunteer with one or more of the Trust's qualified cultural nonprofits. They used those relationships to have both casual and formal conversations about the tax credit. For instance, one Ambassador "shared about the Cultural Trust and the tax credit to (her) 100+ hula and Tahitian students and parents and to newsletter subscribers (1700+)." One "invited Mirabella Portland residents to learn about the Cultural Tax Credit." Another committed to "sharing information to/through City of Salem's Cultural and Tourism Promotion Advisory Board."

One manages a gallery and inserted brochures in every purchase during the holiday season. Several sent emails to all of their contacts encouraging them to participate in the tax credit. One presented at several synagogues, a few chamber groups and at their fitness club.

There were a few standouts who really went above and beyond. We invited a couple to speak at the board meeting: Brie Stoianoff and our own Niki Price. Brie presented at two Portland Lesbian Choir fundraising events, tabled at their winter concert and presented to her office management team. Niki presented to more than a dozen nonprofit boards AND authored op ed letters to several media outlets.

So beyond our suggested actions and activities, the Ambassadors found their own methods of spreading the word. Many are now offering to help us expand the Network by enlisting other potential Ambassadors or thought leaders. One direct quote: "I think you and your team did a great

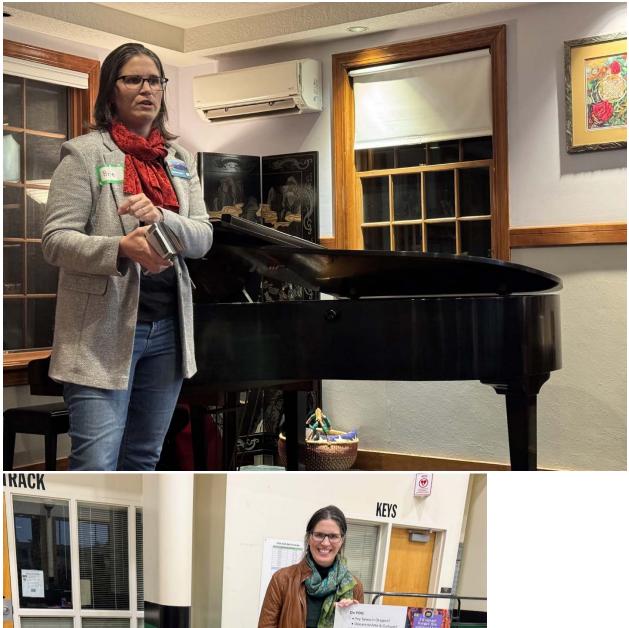
job supporting the volunteers and providing great resources. It was a great experience overall for me."

We are now producing some special thank you gifts for the Ambassadors (Celebrate Oregon! coasters, magnets and notecards) and working to keep them engaged; they are invited to participate in the upcoming Conversations with Funders events and our Advocacy Day cohort gatherings on April 14.

As the Network grows, we will need to invest more resources in supporting our Ambassadors. Ideas for that support are welcome!

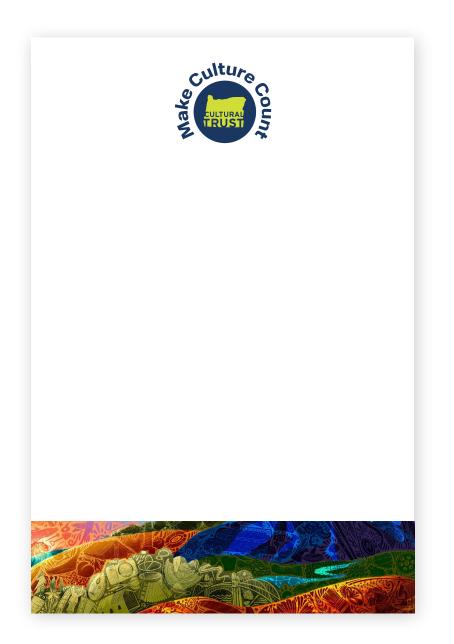
Requested Action:

\boxtimes	Informational only	\square	For board input/discussion 🗌	For board action



Cultural Ambassador Brie Stoianoff at work!





4X6 NOTEPAD

Uprinting.com https://www.uprinting.com/notepad-printing.html?srsltid=AfmBOor1DQRT0PrCaNLsdCDT9C0FApgWpFHGkpPAt3LVXWsvxqO0rDwF

Quantity: 60

Quantity: 100

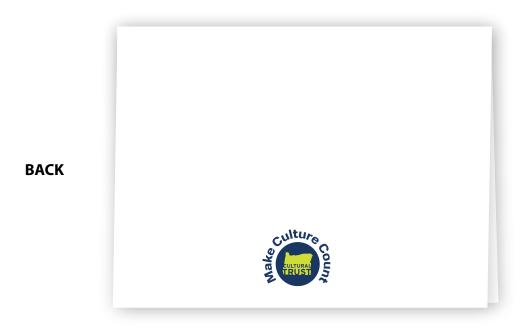
50 sheets/pad \$105.74 (\$1.76 ea)

50 sheets/pad \$155.11 (\$1.55 ea)

100 sheets/pad \$147.64 (\$2.46 ea) 100 sheets/pad \$222.63 (\$2.23 ea)



FRONT



A2 NOTECARD (5.5X4.25")

Smartpress.com https://smartpress.com/offering/card-printing

Quantity: 240 (60 sets of 4) + Envelopes

Matte Coated 120# Cover \$184.45 (\$.77/card, \$3.08/set)

*This option would need packaging purchased separately, est. \$50 Quantity: 240 (60 sets of 4) + Envelopes + Bundle & Shrinkwrap

Matte Coated 120# Cover \$236.70 (\$.99/card, \$3.96/set)



3.5X2.5" METAL WRAPPED MAGNET

Custom-magnets.com https://www.custom-magnets.com/2-5-x-3-5-rectangle-metal-button-magnet-822.html

Quantity: 100 \$278.00 (\$2.78ea)





CORK COASTERS

customcoastersnow.com https://www.customcoastersnow.com/product/coasters/custom/custom-cork-coasters?smp=true

Round Quantity: 240 (60 sets of 4) \$252.00 (1.05/ea, \$4.20/set) Bulk packaged

\$350.40 (1.46/ea, \$5.84/set) Gift box pack of 4 Square Quantity: 240 (60 sets of 4) \$259.20 (1.08/ea, \$4.32/set) Bulk packaged

\$360 (1.50/ea, \$6.00/set) Gift box pack of 4



February 27, 2025

TO:Cultural Trust Board MembersFROM:Aili Schreiner, Cultural Trust ManagerSUBJ:Grant & Program Updates

FY2025 Conversations with Funders

Thanks to the Trust Partner's Cooperative pool of funds, this year's "Conversations with Funders and Partners" will be hosted both virtually and in six communities across the state, March 6 through March 21. The schedule is as follows:

- March 6: Virtual Conversations with Funders, ZOOM, 3-5:30 pm
- March 10: in person Conversations with Funders, WOW Hall, Eugene, 1-4 pm
- March 11: in person Conversations with Funders, World Forestry Center, Portland, 1-4 pm
- March 13: in person Conversations with Funders, Pendleton Center for the Arts, Pendleton, 1-4 pm
- March 18: in person Conversations with Funders, Coos History Museum, Coos Bay, 1-4 pm
- March 19: in person Conversations with Funders, Ashland Library, Ashland, 1-4 pm
- March 21: in person Conversations with Funders, Sisters Library, Sisters, 1-3:30 pm

Joining us again will be service providers such as the Nonprofit Association of Oregon, Rural Development Initiatives, Restore Oregon, the Willamette Week Give!Guide and the Oregon Museums Association.

Participating funders will include:

Travel Oregon, Oregon Arts Commission, Oregon Heritage, Oregon Humanities, the Oregon State Historic Preservation Office, the State of Oregon Library, Regional Arts & Culture Council, the Marie Lamfrom Charitable Foundation, the Oregon Community Foundation, the Spirit Mountain Community Fund, The Roundhouse Foundation, Lane Arts, the Wildhorse Foundation, the Pendleton Foundation Trust and regional representatives from the Cultural Trust's County Cultural Coalitions.

Registration for the events is encouraged but not required, and can be done by location <u>here</u>.

FY2026 Cultural Development Grants*

*Please see attached FY2026 CDV Guidelines, Assessment Rubrics

The Ad Hoc Working group supported the following changes to the Cultural Development Program:

- Introduce survey question about how applicants learned about this program
- Create eligibility quiz for all prospective applicants, terminal statement methodology (go, no go). Draft questions include:
 - Is your organization registered as a <u>cultural nonprofit with the Oregon</u> <u>Cultural Trust</u>?
 - Yes [move forward]
 - No [do not move forward] Cultural Nonprofits must be registered with the Oregon Cultural Trust prior to submission to be eligible for funding. Apply to join <u>HERE</u>]
 - Is your cultural nonprofit actively registered as a Domestic Nonprofit Corporation with the Oregon Secretary of State's Corporation Division?
 - Yes [move forward]
 - No [do no move forward]. Cultural Nonprofits must be actively registered as a Domestic Nonprofit Corporation with Oregon Secretary of State's Corporation Division prior to submission to be eligible for funding.
 - Recipients of Cultural Development grants over two consecutive fiscal years are not eligible to apply for funds in the following fiscal year. Has your cultural nonprofit received a Cultural Development Grant in FY2024 and FY2025?
 - Yes [do not move forward]. Your organization may be eligible to apply to the Cultural Development program for its FY2027 cycle.
 - No [move forward]
 - **1:1 Project Budget Match**: To be eligible for Cultural Development funding, applying cultural nonprofits must demonstrate a 1:1 match for their requested award amount. Sources of matching funds include earned, contributed and/or eligible in-kind support (see Program Guidelines for details). Does your project budget include a minimum 1:1 match for your requested award amount?
 - Yes [move forward]
 - No [do not move forward]. Questions? Please contact Trust staff at <u>Cultural.Trust@biz.oregon.gov</u>
 - Award Request Amount: Applicants to the Cultural Development program may request between \$5,000 and \$40,000 to support eligible cultural projects/programs. Applications requesting less than \$5,000 or more than \$40,000 will not be considered for funding. Is your grant request between \$5,000 and \$40,000?
 - Yes [move forward]

- No [do not move forward]. The Cultural Trust encourages organizations seeking grants under \$5,000 to contact the County or Tribal Cultural Coalition in their area. Contact information for the Coalitions is available at <u>www.culturaltrust.org/coalitions</u>.
- **Ineligible Expenses:** The following expenses are not eligible for Cultural Development funding:
 - Indirect costs not directly associated with the implementation of the project. Indirect costs are activities or services not directly related to the project such as operational expenses and salaries for staff not involved with the project. Direct costs are activities or services that support the specific project, e.g., salaries for project management, materials, marketing, etc.
 - Scholarships or tuition assistance for college, university or other formal degree-bearing courses of study.
 - Projects that have been substantially completed by September 1, 2025, the start date of the grant period.
 - \circ Requests to offset previous project expenses and or deficits.
 - Events whose primary focus is to raise funds for a non-cultural cause.
- Based on the list above, does your project award request to the Trust include <u>only</u> eligible expenses?
 - Yes [move forward]
 - No [do not move forward]. Questions? Please contact Trust staff at <u>Cultural.Trust@biz.oregon.gov</u>
- **Project/Program Budget:** What is your organization's proposed project budget?
 - Numeric Field
 - If organization's proposed project budget is 75% or more than the value of its annual operating budget [do not move forward]. Contact Aili Schreiner, Trust Manager, to discuss your application. <u>Aili.Schreiner@biz.oregon.gov</u> or (503) 428-0963.
 - Link annual operating budget [move forward].
- Create Grantseekers Resource webpage which will include:
 - Revised assessment rubrics (4, 10-point scale criteria)
 - Guidelines and application checklists
 - Links to webinars/orientations
 - FAQ section, with robust, diverse examples of the four categories
 - Examples of completed budget forms
- Publish FY2026 CDV guidelines, with the following edits:
 - Require most recent Form 990 as an attachment to the financial statement
 - Create more detailed descriptions of each category to help applicants

- Provide parenthetical examples of "access" in category description.
 "This is done by removing barriers (financial, structural, geographic, ADA, etc.) and/or creating new cultural opportunities..."
- Add back project scalability to application budget question; now reads "Use the budget narrative section to provide detailed information on your project budget. Is your project scalable? How will Cultural Trust funds be used?"
- Proposed changes to funding process for the Board to review at the 2/27 meeting:
 - Reintroducing Panel Chair Meeting (formally "super panel") after panel meetings and before funding recommendations are sent to the full board
 - Format to be determined after 2/27 board meeting but before panel meetings in June
 - Funding process will reaffirm the commitment to rewarding excellence using the following principles:
 - CDV funding will generally range between 80-100% of requested amount
 - The highest-ranking, exemplary applications will receive 100% of requested amount (~ top 10 projects per category?)
 - The most competitive applications that follow will receive between 80-100% of their requested amount, across all categories, until the program budget is exhausted
 - With staff support, this discussion will take place during the Panel Chair meeting, resulting in a funding proposal sent to the full board for consideration.

Over the next few weeks, we will:

- Publish the updated guidelines, assessment rubrics, and budget form
- Schedule a program orientation for applicants
- Schedule a program orientation for panelists
- Plan to have the application live as soon as possible.

We've begun to receive interest forms from those interested in serving on grant panels, using an interest form posted to the Trust website.

This year's panel dates are:

- 1. Preservation: June 10, 9 a.m. 4 p.m.
- 2. Access: June 12, 9 a.m. 4 p.m.
- 3. Creativity: June 17, 9 a.m. 4 p.m.
- 4. Capacity: June 20, 9 a.m. 4 p.m.

Board members are welcome and encouraged to sign up as panel chairs as soon as possible.

Cultural Coalitions: Coalition Leadership Council, Survey Results*

The Coalition Leadership Council met on January 31 to review the results of the fall Coalition survey *(*see attached presentation of results)*. The Council will meet in March to discuss:

- How would you prioritize challenges to be addressed? •
- How would you prioritize opportunities to be addressed?
- Thinking creatively, what solutions might accomplish the above?
- Did anything jump out to/inspire you? •

The Council and staff will create a series of priorities and recommendations for the Board and staff this spring.

We are happy to report that two tribes are now participating in Coalition funding - the Klamath Tribe and Confederated Tribes of Siletz.

Core Agency Partners, Collaborative Funds

Representatives from the Core Agency Partners now meet monthly to discuss the best use of these funds and to be thought partners in an increasingly unstable cultural programming and funding environment. Partners agree to continue discussions around how to best leverage the opportunities and legislative mandates within the Collaborative Grant Program. The strengths of the program are the opportunities for statewide solutions, support for initiatives that create longer-term gains for the cultural sector and support for community-specific priorities that need matching funds. Examples include projects with federally matching funds (e.g. support for Tribes with new NAGPRA requirements, gap funding, etc.) and occasions where statewide connections can help connect emerging, large-scale opportunities (e.g. America 250 commemoration).

The Partners also agreed to assess long-term funding recipients. Included among these are the state Poet Laureate program. The Partners commit to ongoing discussions around the goals and impacts of the Collaborative Grant Program, including inviting input from peers in the sector and to greater public engagement. The Partners would like to widen and enrich the "opportunity pipeline" for greater statewide impact through this unique funding program. This may include meetings with sector-specific representatives such as nonprofit service providers (e.g. Nonprofit Association of Oregon) and federally recognized tribes and indigenous community leaders. Partners intend to share their respective work with Oregon tribes on an ongoing basis, including reports from such bodies as the Legislative Commission on Indian Services.

OPD and CNP Applications

Staff are now reviewing 15 Winter applications in the Organizational and Professional Development program (OPD) and 24 applications from those seeking to join our eligible cultural nonprofits (CNP).

Requested Action:

Informational only 🖂

For board input/discussion

For board action



Oregon Cultural Trust FY2026 Cultural Development Grant Guidelines

To support activity occurring between September 1, 2025, and August 31, 2026

Application Deadline: 5 pm Wednesday, May 7, 2025

The Cultural Trust envisions an Oregon that champions and invests in creative expression and cultural exchange, driving innovation and opportunity for all. The mission of the Cultural Trust is 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.

Cultural Development grants are annual funding opportunities for eligible cultural nonprofits undertaking public projects in Oregon. Awards between \$5,000 and \$40,000 are available for cultural projects taking place between September 1, 2025, and August 31, 2026.

These guidelines are intended to assist cultural nonprofits in successfully submitting applications for funding consideration.

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Questions? Please contact Aili Schreiner at (503) 428-0963 for programmatic questions or Raissa Fleming (503) 986-0088 for technical assistance. Para asistencia en español, llame al 971-345-1641.

Program Requirements

By statute [ORS 359.431], Cultural Development grants fund projects that:

- Address significant opportunities to advance, preserve or stabilize cultural resources;
- Invest in the development of new resources;
- Support proposals that have a broad cultural impact beyond the applicant itself; and
- Support proposals from applicants with culture as a priority within the mission of the organization.

Competitive projects should support the Cultural Trust's vision and mission to:

- Create an Oregon that champions and invests in creative expression and cultural exchange;
- Help drive innovation and opportunity for all;
- Cultivate, grow and value culture as an integral part of communities;
- Inspire Oregonians to invest in cultural nonprofits;
- Maximize visibility for the role of culture in our lives; and
- Strengthen collaboration and support within the statewide cultural network.

Organization Requirements

Eligibility

The Cultural Trust seeks to support a wide range of cultural organizations across the state. ORS 359.400 defines a "cultural organization" as one that is "organized primarily for the purpose of producing, promoting or presenting the arts, history, heritage and humanities to the public or organized primarily for identifying, documenting, interpreting and preserving cultural resources." **Organizations using a fiscal sponsorship are not eligible to apply.**

At the time of the application deadline, all applicant organizations must:

- Have active registration with the State of Oregon for corporate, non-profit status and
- Provide services that take place within the state of Oregon and
- Have current IRS 501(c)(3) federal tax-exempt status or
- Be a cultural entity within a federally recognized Indian Tribe based in Oregon *or*
- Be an institution of higher learning (universities and colleges) that has a significant cultural program or cultural organization

Applicants must have current registration on the Cultural Trust's website as an eligible cultural nonprofit. Register by completing the <u>online application</u>.

Recipients of Cultural Development grants over two consecutive fiscal years are **not eligible** to apply for funds in the following fiscal year. As a result, organizations awarded a grant in both FY2024 <u>and</u> FY2025 are **not eligible** to apply for FY2026 funds and must wait until the FY2027 grant cycle.

The Cultural Trust has final determination on eligibility. Applications found ineligible will be withdrawn from consideration. The Cultural Trust may review eligibility at any time and request more information as necessary.

Application Categories

Choosing your project category

Cultural Development Grants recognize and support significant cultural projects that preserve and enhance Oregon's diverse arts, history, heritage, historic preservation, and humanities efforts.

The Cultural Development Grant program has four distinct categories that support culture in Oregon. Applying cultural organizations must select the category that aligns with the goals of their project. Does the project primarily support:

- Access to Culture: Projects that make culture broadly available to Oregonians. Access to Culture projects create new, or increase, public access to culture. This is done by removing barriers (financial, structural, geographic, ADA, etc.) and/or creating new cultural opportunities for communities often underserved.
- 2) Cultural Heritage & Preservation: Projects that invest in Oregon's cultural heritage by recovering, preserving and sharing historic assets and achievements. Cultural Heritage & Preservation projects restore or renovate historic assets, create educational exhibits, support digital/oral preservation and archival work, and/or support museum collections and historic research/publications.
- *3)* **Cultural Creativity:** Projects that support the cultural and creative expression of Oregonians. Cultural Creativity projects invest in creative work by supporting the development of artists, cultural experts or scholars. Creative Expression projects promote creative expression as a core part of vibrant communities with public exhibits/artistic residencies, cultural/artistic programming/productions/performances, commemorative works or special commissions, scholarly research and publications, and/or support for emerging creative leaders.
- 4) Strengthen Cultural Capacity: Projects that strengthen cultural organizations by building their stability and generating public confidence. Strengthen Cultural Capacity projects should reflect strategic investments in cultural organizations' capacity and/or improved sustainability, prioritizing new resources that best support their community and cultural impacts.

Organizations may submit <u>one</u> application to <u>one</u> category per grant cycle.

Complete application questions are found on pages 10-17 in the guideline appendix.

Application Review Criteria

How does it work?

Cultural Trust staff review submitted project applications for eligibility, completeness, and accuracy. Staff will contact the organization and provide an explanation if the organization or project does not meet the eligibility requirements.

Project applications are reviewed by changing panels of peer-review professionals with relevant experience. Applicants should not assume that panelists have prior knowledge of their work. Applicants who would like to nominate a panelist for consideration to review

applications may do so by filling out the <u>panel interest form</u>. Program category panels will evaluate all eligible applications. Their evaluation includes:

- 1. Significance and quality of project, and alignment within the selected category;
- 2. Community impact and public benefit of the project;
- 3. Project management and evaluation; and
- 4. Budget form and narrative.

Each panel is chaired by a non-voting Cultural Trust Board member or the Executive Director. The Cultural Trust staff will present funding recommendations based on panel evaluation, number of applications and availability of funds to the Cultural Trust Board for final review and action. Applicants will be notified by email of the Cultural Trust's action once the state budget is enacted, typically in August.

Funding Requirements

Cultural Development Grants range from \$5,000 to \$40,000. The Cultural Trust will not consider applications that exceed the maximum request amount.

The Cultural Trust encourages organizations seeking grants under \$5,000 to contact the County or Tribal Cultural Coalition in their area. <u>Contact information for the Coalitions</u> is posted on our website.

Matching Requirement

One to One (1:1) Award Match

ORS 359.431 requires that Cultural Development Grant awards be matched at least 1:1 with earned, contributed or eligible in-kind support. Applications that do not have at least a 1:1 match will be found ineligible and will not be considered for funding.

For example:

Trust Grant Request	Cash Match	In-Kind Match	Total Project Budget
\$5,000	\$3,500	\$1,500	\$10,000

In-kind contributions are any non-cash contributions of time, services or property donated by individuals or organizations other than the applicant organization (third-party).

In-kind contributions may include:

- Goods (computers, software, furniture, and office equipment for use by your organizations or for special events);
- Services (meeting space, photocopy and mail services, administrative/financial support); or
- Expertise (legal, tax or business advice, marketing and website development, strategic planning).

Examples of in-kind contributions:

• A consultant regularly charges \$1,000 but gives you a reduced rate of \$600. The full

value is \$1,000 but \$600 is a fee and \$400 is an in-kind donation.

• The local newspaper regularly charges \$350 for an ad but they are giving it to you for free. The in-kind donation is valued at \$350.

Volunteer time should be calculated using the <u>Independent Sector value</u>.

In-kind contributions must be in alignment with Standard Accounting Principles to be considered. Staff or board member time is not considered an eligible in-kind contribution unless the board member is providing a professional service at a discounted rate.

The most competitive applications will show cash matches committed by other funders or contributors. Questions about what qualifies as a match? Contact Trust Manager Aili Schreiner at <u>aili.schreiner@biz.oregon.gov</u> or (503) 428-0963.

What We Don't Fund

The following are not eligible for Cultural Trust funding.

- Indirect costs not directly associated with the implementation of the project. Indirect
 costs are activities or services not directly related to the project such as operational
 expenses and salaries for staff not involved with the project. Direct costs are activities
 or services that support the specific project, e.g., salaries for project management,
 materials, marketing, etc.
- Scholarships or tuition assistance for college, university or other formal degree bearing courses of study.
- Projects that have been substantially completed by September 1, 2025, the start date of the grant period.
- Requests to offset previous project expenses and or deficits.
- Events whose primary focus is to raise funds for a non-cultural cause.

Applications from institutions of higher learning (universities and colleges) must be for projects and activities that focus on, benefit, and are open to the general public; the general public must form a significant portion of the total audience/community served.

Application Requirements

Submission Deadline: <u>5 pm Wednesday, May 7, 2025</u>

Online Application

All applications must be submitted through our <u>online portal</u> no later than **5 pm Wednesday**, **May 7, 2025**, to receive consideration for funding. The Cultural Trust is not responsible for late applications and cannot guarantee processing of applications submitted after the published deadline.

Incomplete applications will be deemed ineligible and may not be considered for funding.

Tips for working in online application:

• Cut and paste plain text only into the online forms. Software such as Notepad works well.

• To avoid losing data, you must <u>save every page</u> in the online system before moving on to the next.

Required attachments:

Upload the following required attachments to your online application (as applicable):

- 1. FY2026 Cultural Development Budget Template
- 2. Most recent Form 990
- 3. Other supporting material (e.g. strategic plans, press clippings, artist/scholar resumes) floor plans or site plans on 8 1/2" by 11"pages, images, short (no more than 1-2 minute) videos. Or include a PDF document with embedded links. Panelists value the chance to get to know your project!
- 4. Applications requesting funds for collaborative projects <u>must</u> include **letters of commitment** from participating organizations outlining how they will collaborate in the work.
- 5. Applications requesting funds to support activities in, or in partnership with, K-12 schools <u>must</u> include a letter of support from participating school(s) that indicates their role in activity planning and anticipated participation.
- 6. First time applicants only: IRS 501(c)(3) letter or proof of Tribal status (one copy)

Do not submit any additional supplemental materials by mail.

Program Contacts & Assistance

Programmatic Questions

Aili Schreiner, Trust Manager Oregon Cultural Trust 775 Summer St NE, Ste. 310 Salem, OR 97301 (503) 428-0963 Aili.Schreiner@biz.oregon.gov

Online Technical Assistance

Raissa Fleming, Grants Officer Oregon Cultural Trust 775 Summer St NE, Ste. 310 Salem, OR 97301 (503) 986-0090 Raissa.Fleming@biz.oregon.gov

Assistance with technical requirements and application scope is available from Cultural Trust staff prior to the application deadline. To schedule time for a pre-application project/draft application review, send a request to <u>Aili.Schreiner@biz.oregon.gov</u> or call (503) 428-0963. Applicants may also seek feedback after funding decisions and notification have been made.

We strongly urge you to request assistance **before April 23, 2025**, to ensure you have adequate time to incorporate feedback.

FINAL REPORTS

Final Report Deadline: <u>5 pm Thursday, October 1, 2026</u>

Information is required from award recipients at the conclusion of the funding period. To help the Cultural Trust report on the results of public funding, entities receiving awards must complete a final report. Final reports must be submitted within thirty (30) days of the completion of the funding period. <u>All awardees are subject to periodic monitoring by the</u> <u>Cultural Trust and must retain fiscal records for a period of three (3) years following</u> <u>completion of the funding period</u>. Award recipients that have been previously funded by the Cultural Trust must fulfill outstanding final reporting requirements before new funds will be distributed.

The following questions and data will be collected on the Final Report. Please track this information during the funding period:

- 1. Did you achieve the goals of your project? Describe how your successes were measured, and how any setbacks were handled. Include in your answer any changes to your project/activities that occurred during the grant period.
- 2. Using specifics, describe who participated in your project and the individuals who benefited from your project (numbers, age, geographic distribution, etc.). How did this project impact your organization and your community?
- 3. Did your project provide educational opportunities? Please describe what these were, who benefitted and how, include number of people served.
- 4. Provide a detailed list of in-kind contributions (include estimated value and description).
- 5. What was the total value and source of project contributions (include descriptions)?

Be prepared to document project locations (see template) and attach all promotional materials produced for your project that credit your grant award from the Oregon Cultural Trust.

Final report data will not be evaluated by the Cultural Trust review panels and does not affect current or future applications. This information will be used by the Cultural Trust for reporting and is required with the final report for funded applications. If you have questions, please contact the Oregon Cultural Trust at <u>cultural.trust@biz.oregon.gov</u> or call (503) 986-0088.

Appeal Process

The Oregon Cultural Trust recognizes that procedural errors may occur in the application process. The Cultural Trust is committed to acknowledging errors and rectifying the effects. Appeals may not be made on the basis of an applicant's disagreement with an assessment of how the application met the review criteria, the judgment of a review panel or the amount of the award.

Applicants considering an appeal should contact Cultural Trust Manager Aili Schreiner, by phone at (503) 428-0963 or by email at <u>Aili.Schreiner@biz.oregon.gov</u>, for advice and guidance. Letters of appeal must be submitted to the Cultural Trust's Executive Director within 30 days of public notice of grant awards. Appeals are reviewed and acted on by the Cultural Trust Board. Appeals may result in an approval of an award or an increase in the award amount if the applicant can satisfactorily document that the applicant. If the appeal is supported by the Cultural Trust's Board, funds will be awarded as they are available.

Applicants not meeting one or more of the eligibility requirements as determined by staff are encouraged to discuss the decision with staff. Appeals concerning eligibility determination may be made. Letters of appeal must be submitted to the Cultural Trust's Executive Director within 15 days of public notice of grant awards. All decisions made by the Cultural Trust are final.

Pending Status

Occasionally the Cultural Trust may put a grant on pending status if a project is preliminarily awarded. Cultural Trust staff will contact the applicant on pending status and discuss the information that is needed in order to review and act.

Americans with Disabilities Act Statement of Non-discrimination

Any entity that provides services to the public must certify that it complies with the Americans with Disabilities Act of 1990, 42, USC Sec. 12101, et seq. and agrees not to discriminate on the basis of race, creed, religion, color, sex, marital status, political opinion, familial status, national origin, age, gender, sexual orientation, military status, gender identity, source of income or disability status. The Cultural Trust provides assistance to Oregon cultural groups on issues of access. Contact the Oregon Cultural Trust at (503) 986-0082 or kat.bell@biz.oregon.gov at least 48 hours in advance of the application deadline for information or assistance. TDD assistance is available at (800) 735-2900. Applicants will certify their compliance within the application.

The Cultural Trust has adopted the following Accessibility Grievance Procedure:

If a person with a disability believes that a facility or program funded by the Oregon Cultural Trust is inaccessible, they are encouraged to communicate the grievance to the sponsoring organization. If an acceptable response is not received within two weeks, that individual may contact Cultural Trust Executive Director Brian Rogers at <u>brian.rogers@biz.oregon.gov</u> or 971-209-5385.

Each grievance reported to the Oregon Cultural Trust will be handled on a case-by-case basis. Possible Oregon Cultural Trust actions include:

- Sending staff to assist the organization on issues of accessibility;
- Involving people with disabilities from the local community in an effort to increase the organization's accessibility;
- Requesting return of funds already granted for the current fiscal years; and
- Denying future grant requests; and
- In all cases, an organization with a pending grievance will be denied funding unless it can demonstrate to the Oregon Cultural Trust that it is working toward compliance with current accessibility standards.

ACCESS TO CULTURE

Apply to the category that **best aligns with the goals and outcomes of your project**. For examples of previous awards by program category visit <u>https://culturaltrust.org/blog/</u>. Contact Trust Manager Aili Schreiner at <u>Aili.Schreiner@biz.oregon.gov</u> or (503) 428-0963 with questions regarding program categories.

Applicants are encouraged to use published application <u>assessment rubrics</u> when choosing the appropriate grant category.

ACCESS TO CULTURE: Making culture broadly available to Oregonians

Access to Culture projects make culture broadly available to Oregonians. Access to Culture projects strategically create or increase public access to culture. This is done by removing barriers (financial, structural, geographic, ADA, etc.) and/or creating new cultural opportunities for communities often underserved. Funded Access projects can include public exhibits/artworks, new/increased access to cultural programming and outreach to new/under-resourced communities, among others.

Summary of Project & Request (up to 200 words)

Provide a summary of your project and request for support. Begin with the words "To support...". For example: *"To support access to theatre performances for hearing impaired audience members by contracting with American Sign Language interpreters."*

Summary of Organization and Community Served (up to 400 words)

State your organization's mission and summarize your organization's programs and activities. How are stakeholders and other constituents involved in the work and/or decision-making of the organization? Briefly describe the community your organization serves, noting if you serve communities of color, culturally specific communities, rural areas or any other traditionally underserved populations.

Significance and Quality of Project: 10 points (up to 750 words)

Describe the barriers to cultural opportunities in your community and how this informed the design of your project (scope, time, budget).

Community Impact and Public Benefit: 10 points (up to 750 words)

Describe the change that will result from this project. How will increased access to cultural opportunities impact your community and your organization? Include intended outcomes and who will benefit (include population/geographic scope). If your organization has developed goals around diversity, equity and inclusion, how does this project help achieve these goals?

Project Management and Evaluation: 10 points (up to 750 words)

Who will measure the project's success and what indicators will they use? Please describe project outputs (number of participants, demographics, deliverables) and outcomes (changes in engagement, barriers, value of culture). Describe the qualifications of your staff and board to evaluate project success and provide strong organizational/fiscal management.

Budget Requirements

All applicants must complete and upload the Cultural Trust's excel budget template to their online application. Please use the online budget narrative section to provide detailed information on your budget that will clarify items for the review panel.

Budget Form & Narrative: 10 points

Use the budget narrative section to provide detailed information on your project budget. Is your project scalable? How will Cultural Trust funds be used?

CULTURAL HERITAGE & PRESERVATION

Apply to the category that **best aligns with the goals and outcomes of your project**. For examples of previous awards by program category visit <u>https://culturaltrust.org/blog/</u>. Contact Trust Manager Aili Schreiner at <u>Aili.Schreiner@biz.oregon.gov</u> or (503) 428-0963 with questions regarding program categories.

Applicants are encouraged to use published application <u>assessment rubrics</u> when choosing the appropriate grant category.

CULTURAL HERITAGE & PRESERVATION: Investing in Oregon's cultural heritage by recovering, preserving and sharing historic assets and achievements

Cultural Heritage & Preservation projects invest in Oregon's cultural heritage by recovering, preserving and sharing historic assets and achievements. Cultural Heritage & Preservation projects restore or renovate historic assets, create educational exhibits, support digital/oral preservation and archival work, and/or support museum collections and historic research/publications, among others.*

* Organizations undertaking large-scale preservation construction/ renovation projects (+\$500,000) are encouraged to contact the Cultural Advocacy Coalition to discuss the Cultural Resource Economic Fund (www.oregonculture.org).

Summary of Project & Request (up to 200 words)

Provide a summary of your project and request for support. Begin with the words "To support...". For example: *"To support the design and creation of a sustainable historic lighthouse garden for contextual and educational programing."*

Summary of Organization and Community Served (up to 400 words)

State your organization's mission and summarize your organization's programs and activities. How are stakeholders and other constituents involved in the work and/or decision-making of the organization? Briefly describe the community your organization serves, noting if you serve communities of color, culturally specific communities, rural areas or any other traditionally underserved populations.

Significance and Quality of Project: 10 points (up 750 words)

Explain the significance of the cultural heritage or preservation project to your community and how this informed the design of your project (scope, time, budget). If this is a renovation or construction project, identify the proposed contractor and their qualifications.

Community Impact and Public Benefit: 10 points (up to 750 words)

Describe the change that will result from this project. How will increased investment in cultural heritage impact your community? Include intended outcomes and who will benefit (include population/geographic scope). If your organization has developed goals around diversity, equity and inclusion, how does this project help achieve these goals?

Project Management and Evaluation: 10 points (up to 750 words)

Who will measure the project's success and what indicators will they use? Please describe project outputs (number of participants, demographics, deliverables) and outcomes (historic assets and achievements recovered/preserved/shared; value of investment in Oregon heritage increased). Describe the qualifications of your staff and board to evaluate project success and provide strong organizational/fiscal management.

Budget Requirements

All applicants must complete and upload the Cultural Trust's excel budget template to their online application. Please use the online budget narrative section to provide detailed information on your budget that will clarify items for the review panel.

Budget Form & Narrative: 10 points

Use the budget narrative section to provide detailed information on your project budget. Is your project scalable? How will Cultural Trust funds be used?

CULTURAL CREATIVITY

Apply to the category that **best aligns with the goals and outcomes of your project**. For examples of previous awards by program category visit <u>https://culturaltrust.org/blog/</u>. Contact Trust Manager Aili Schreiner at <u>Aili.Schreiner@biz.oregon.gov</u> or (503) 428-0963 with questions regarding program categories.

Applicants are encouraged to use published application <u>assessment rubrics</u> when choosing the appropriate grant category.

CULTURAL CREATIVITY:

Supporting the Cultural and Creative Expression of Oregonians

Cultural Creativity projects support the cultural and creative expression of Oregonians. Cultural Creativity projects invest in creative work by supporting the development of artists, cultural experts or scholars. Cultural Creativity projects promote creative expression as a core part of vibrant communities with public exhibits/artistic residencies, cultural/artistic programming/productions/performances, commemorative works or special commissions, scholarly research and publications, and/or support for emerging creative leaders, among others.

Summary of Project & Request (up to 200 words)

Provide a summary of your project and request for support. Begin with the words "To support...". For example: *"To support the residency of an artist and a humanities expert to develop a commemorative work to celebrate our organization's 30th anniversary."*

Summary of Organization and Community Served (up to 400 words)

State your organization's mission and summarize your organization's programs and activities. How are stakeholders and other constituents involved in the work and/or decision-making of the organization? Briefly describe the community your organization serves, noting if you serve communities of color, culturally specific communities, rural areas or any other traditionally underserved populations.

Significance and Quality of Project: 10 points (up 750 words)

Describe the work by artists, cultural experts or scholars who promote cultural and creative expression as a core part of vibrant communities and how this informed the design of your project (scope, time, budget).

Community Impact and Public Benefit: 10 points (up to 750 words)

Describe the change that will result from this project. How will support for creative expression impact your community and your organization? Include intended outcomes and who will benefit (include population/geographic scope). If your organization has developed goals around diversity, equity and inclusion, how does this project help achieve these goals?

Project Management and Evaluation: 10 points (up to 750 words)

Who will measure the project's success and what indicators will they use? Please describe project **outputs** (number of participants, demographics, deliverables) and **outcomes** (changes in artistic/cultural engagement, creativity in community, value of creative

expression). Describe the qualifications of your staff and board to evaluate project success and provide strong organizational/fiscal management.

Budget Requirements

All applicants must complete and upload the Cultural Trust's excel budget template to their online application. Please use the online budget narrative section to provide detailed information on your budget that will clarify items for the review panel.

Budget Form & Narrative: 10 points

Use the budget narrative section to provide detailed information on your project budget. Is your project scalable? How will Cultural Trust funds be used?

STRENGTHEN CULTURAL CAPACITY

Apply to the category that **best aligns with the goals and outcomes of your project**. For examples of previous awards by program category visit <u>https://culturaltrust.org/blog/</u>. Contact Trust Manager Aili Schreiner at <u>Aili.Schreiner@biz.oregon.gov</u> or (503) 428-0963 with questions regarding program categories.

Applicants are encouraged to use published application <u>assessment rubrics</u> when choosing the appropriate grant category.

STRENGTHEN CULTURAL CAPACITY:

Strengthening Cultural Organizations

Strengthen Cultural Capacity projects build stability for cultural organizations and generate public confidence. Strengthen Cultural Capacity projects should reflect strategic investments in cultural organizations' capacity and/or improved sustainability by prioritizing new resources, thereby serving their community and deepening cultural impacts. New investments in organizational capacity/sustainability (staffing, equipment, marketing, development, online resources, building infrastructure, etc.) are eligible; requests for general operating support are not eligible.

Summary of Project & Request (up to 200 words)

Provide a summary of your project and request for support. Begin with the words "To support...". For example: "*To support a planning process to enable our organization to effectively respond to increased demand for our services and activities.*"

Summary of Organization and Community Served (up to 400 words)

State your organization's mission and summarize your organization's programs and activities. How are stakeholders and other constituents involved in the work and/or decision-making of the organization? Briefly describe the community your organization serves, noting if you serve communities of color, culturally specific communities, rural areas or any other traditionally underserved populations.

Significance and Quality of Project: 10 points (up 750 words)

Explain the significance of this one-time, strategic investment to your organization. If funded, how will the project build your organization's capacity by increasing stability or improving sustainability? Is this an investment in your organization's programmatic or operational capacity? How did this inform the design of your project (scope, time, budget)?

Community Impact and Public Benefit: 10 points (up to 750 words)

Describe the change that will result from this project. How will a strategic investment in your organizational capacity impact your organization and the community you serve in the short and long term? If your organization has developed goals around diversity, equity and inclusion, how does this project help achieve these goals?

Project Management and Evaluation: 10 points (up to 750 words)

Who will measure the project's success and what indicators will they use? Please describe project **outputs** (new staffing, equipment, marketing, development, online resources, building

infrastructure, etc.), and **outcomes** (increased stability, improved sustainability, barriers to organization diminished, value of organization to community increased). Describe the qualifications of your staff and board to evaluate project success and provide strong organizational/fiscal management.

Budget Requirements

All applicants must complete the online budget form with project expenses and revenue. Please use the online budget narrative section to provide detailed information on your budget that will clarify items for the review panel.

Budget Form & Narrative: 10 points

Use the budget narrative section to provide detailed information on your project budget. Is your project scalable? How will Cultural Trust funds be used?

Name of Organization Project Date Range	FY2026 Cultural Development Proje		
Project Date Range			Please save this form in a place where you can find it. — Upload your completed project budget template as an
	:		attachment to your grant application.
PROJECT EXPENSES	Description	Total Expenses	
Staff Time		\$	
Contracted Services	3	\$	
Space/Facility Costs	3	\$	
Materials/Supplies	5	\$	
Equipment	t	\$	
Travel/Per Diem		\$	
Marketing and Promotior		\$	
Other Project Expenses	5	\$	
Other Project Expenses		\$	
Other Project Expenses		\$	
Other Project Expenses		\$	
	PENSES (ALL SOURCES)	\$	
			Indicate Status:
PROJECT REVENUE	Description	Total Revenue	Planned, Pending or Confirmed
Donations/Contributions	5	\$	
Grants (public or private))	\$	
Grants		\$	
Earned Revenue (admissions/memberships/fees for services)		\$	
Earned Revenue		\$	
Sponsorships	3	\$	
Sponsorships	\$	\$	
Sponsorships	3	\$	
Sponsorships	3	\$	
Applicant Cash		\$	
Cultural Development Grant Request	t	\$	<i>Requests to the Cultural Trust cannot exceed 50% of your tot project budget.</i>
TOTAL REV	(ENUES (ALL SOURCES)	\$	
		¢	Note: Expenses and Revenue must equal;
		>	please submit a balanced budget plan.
	TOTAL PROJECT REVENUE	\$	
IN-KIND	Description	Total In-Kind	Indicate Status: Planned, Pending or Confirmed
-kind Goods: naterials or products that have been		\$	
-kind Services: olunteers*, pro bono professional services, c.)		\$	
TOTAL IN-KIND	•	Ś	
olunteer hours may be calculated at the nat	tional standard of \$33.49 (https://independentsector.c name and project start date are at the top of the page.		eer-time/)



ACCESS TO CULTURE

Making culture broadly available to Oregonians

Cultural Development Application: Category Assessment Rubric

Access to Culture projects make culture broadly available to Oregonians. Access to Culture projects strategically create or increase public access to culture. This is done by removing barriers (financial, structural, geographic, ADA, etc.) and/or creating new cultural opportunities for communities often underserved. Funded Access projects can include public exhibits/artworks, new/increased access to cultural programming and outreach to new/underserved under resourced communities, among others.

Significance & Quality of Project	Exemplary-Strong	Good-Fair	Marginal-Weak
<i>Up to 10 points</i>	(range: 10-7)	(range: 6-3)	(range: 2-0)
Describe the barriers to cultural opportunities in your community and how this informed the design of your project (scope, time, budget).	Community-specific barriers to cultural opportunities clearly identified and defined. Significance of project to community clearly described. Project activities clearly address community-specific barriers to cultural opportunities.	Community-specific barriers to cultural opportunities defined. Significance of project to community described. Project activities address community-specific barriers to cultural opportunities.	Community-specific barriers to cultural opportunities poorly defined. Significance of project to community unclear. Project activities do not directly address community-specific barriers to cultural opportunities.
Community Impact & Public Benefit	Exemplary-Strong	Good-Fair	Marginal-Weak
<i>Up to 10 points</i>	(range: 10-7)	(range: 6-3)	(range: 2-0)
Describe the change that will result from this project. How will increased access to cultural opportunities impact your	Project specifically demonstrates meaningful public value.	Project demonstrates meaningful public value.	Project partially demonstrates meaningful public value.

community and your organization? Include intended outcomes and who will benefit (include population/geographic scope). If your organization has developed goals around diversity, equity and inclusion, how does this project help achieve these goals?	Project activities clearly designed to increase access to cultural opportunities by addressing barriers to constituents not currently supported in area/community of service. If organization has identified diversity, equity and inclusion goals, there is clear alignment with stated project goals.	Project activities designed to increase access to cultural opportunities by addressing barriers to constituents not currently supported in area/community of service. If organization has identified diversity, equity and inclusion goals, there is alignment with stated project goals.	Project activities not designed to increase access to cultural opportunities; barriers to constituents not currently supported in area/community of service not addressed. If organization has identified diversity, equity and inclusion goals, there is little alignment with stated project goals.
Project Management & Evaluation <i>Up to 10 points</i>	Exemplary-Strong (range: 10-7)	Good-Fair (range: 6-3)	Marginal-Weak (range: 2-0)
Up to 10 points Who will measure the project's success and what indicators will they use? Please describe project outputs (number of participants, demographics, deliverables) and outcomes (changes in engagement, barriers, value of culture). Describe the qualifications of your staff and board to evaluate project success and provide strong organizational/fiscal management.	(range: 10-7) Evaluation plan clearly articulates why the project was determined to be successful. Evaluation plan in place to measure change over the funding period. Project-specific outputs and outcomes clearly defined. Explanation of organization and project management shows: 1) Staff and Board highly qualified; 2) Clear ability to monitor project progress; 3) Clear evidence of fiscally	(range: 6-3) Evaluation plan articulates why the project was determined to be successful. Project outputs and outcomes provided but not distinguished. Explanation of organization and project management shows: 1) Staff and Board reasonably qualified; 2) Adequate ability to monitor project progress; 3) Reasonable evidence of fiscally responsible and healthy	(range: 2-0) Evaluation plan poorly articulates why the project was determined to be successful. Evaluation plan unclear. Project outputs and outcomes not defined. Explanation of organization and project management shows: 1) Staff and Board lacking appropriate qualifications; 2) Ability to monitor project progress unclear; 3) Little evidence of fiscally
	responsible and healthy organization.	organization.	responsible and healthy organization.

Budget Form & Narrative <i>Up to 10 points</i>	Exemplary-Strong (range: 10-7)	Good-Fair (range: 6-3)	Marginal-Weak (range: 2-0)
Budget Form: Uploaded Budget Template	Project budget template is complete.	Project budget template is partially complete.	Project budget template is incomplete.
Narrative: Is your project scalable? How will Cultural Trust funds be used?	Project income and expenses are described in detail.	Project income and expenses are described.	Project income and expenses are not described.
	Project revenue section indicates planned, pending or confirmed status.	Project revenue section indicates planned, pending or confirmed status.	Project revenue status incomplete.
			Cultural Development Grant Request amount not identified.
	Cultural Development Grant Request amount identified. Request amount does not exceed 50% of	Cultural Development Grant Request amount identified. Request amount does not exceed	In-Kind Contributions section unclear and/or reflects 100% of
	total project budget.	50% of total project budget.	required applicant income match.
	In-Kind Contributions section completed (as applicable). In-Kind contributions are less than 50% of	In-Kind Contributions section completed (as applicable). In-Kind contributions are not the majority	Total Project Expenses and Revenue do not equal.
	required applicant income match.	of required applicant income match.	Budget Narrative does not identify how Cultural Trust funds will be
	Total Project Expenses and Revenue equal.	Total Project Expenses and Revenue equal.	used and if the project is scalable.
	Budget Narrative clearly identifies how Cultural Trust funds will be	Budget Narrative identifies how	
	used and if the project is scalable.	Cultural Trust funds will be used and if the project is scalable.	



CULTURAL HERITAGE & PRESERVATION

Investing in Oregon's cultural heritage by recovering, preserving and sharing historic assets and achievements.

Cultural Development Application: Category Assessment Rubric

Cultural Heritage & Preservation projects invest in Oregon's cultural heritage by recovering, preserving and sharing historic assets and achievements. Cultural Heritage & Preservation projects restore or renovate historic assets, create educational exhibits, support digital/oral preservation and archival work, and/or support museum collections and historic research/publications, among others.

Significance & Quality of Project <i>Up to 10 points</i>	Exemplary-Strong (range: 10-7)	Good-Fair (range: 6-3)	Marginal-Weak (range: 2-0)
Explain the significance of the cultural heritage or preservation project to your community and how this informed the design of your project (scope, time,	Significance of the cultural heritage or preservation project to community clearly defined.	Significance of the cultural heritage or preservation project to community defined.	Significance of the cultural heritage or preservation project to community ill defined.
budget). If this is a renovation or construction project, identify the proposed contractor and their qualifications.	Project activities clearly advance Oregon's cultural heritage by recovering, preserving, and/or sharing historic assets and achievements.	Project activities advance Oregon's cultural heritage by recovering, preserving, and/or sharing historic assets and achievements.	Project activities do not advance Oregon's cultural heritage by recovering, preserving, and/or sharing historic assets and achievements.
Community Impact & Public Benefit <i>Up to 10 points</i>	Exemplary-Strong (range: 10-7)	Good-Fair (range: 6-3)	Marginal-Weak (range: 2-0)
Describe the change that will result from this project. How will increased investment in cultural heritage impact	Project specifically demonstrates meaningful public value.	Project demonstrates meaningful public value.	Project does not demonstrate meaningful public value.

your community? Include intended outcomes and who will benefit (include population/geographic scope). If your organization has developed goals around diversity, equity, and inclusion, how does this project help achieve these goals?	Project activities clearly designed to increase investment in cultural heritage. If organization has identified diversity, equity, and inclusion goals, there is clear alignment with stated project goals.	Project activities designed to increase investment in cultural heritage. If organization has identified diversity, equity, and inclusion goals, there is alignment with stated project goals.	Project activities not designed to increase investment in cultural heritage. If organization has identified diversity, equity, and inclusion goals, there is little alignment with stated project goals.
Project Management & Evaluation <i>Up to 10 points</i>	Exemplary-Strong (range: 10-7)	Good-Fair (range: 6-3)	Marginal-Weak (range: 2-0)
Up to 10 points Who will measure the project's success and what indicators will they use? Please describe project outputs (number of participants, demographics, deliverables) and outcomes (historic assets and achievements recovered/preserved/ shared; value of investment in Oregon heritage increased). Describe the qualifications of your staff and board to evaluate project success and provide strong organizational/fiscal management.	(range: 10-7) Evaluation plan clearly articulates why the project was determined to be successful. Evaluation plan in place to measure change over the funding period. Project-specific outputs and outcomes clearly defined. Explanation of organization and project management shows: 1) Staff and Board highly qualified; 2) Clear ability to monitor project progress; 3) Clear evidence of fiscally responsible and healthy organization.	(range: 6-3) Evaluation plan articulates why the project was determined to be successful. Project outputs and outcomes provided but not distinguished. Explanation of organization and project management shows: 1) Staff and Board reasonably qualified; 2) Adequate ability to monitor project progress; 3) Reasonable evidence of fiscally responsible and healthy organization.	(range: 2-0) Evaluation plan poorly articulates why the project was determined to be successful. Evaluation plan unclear. Project outputs and outcomes not defined. Explanation of organization and project management shows: 1) Staff and Board lacking appropriate qualifications; 2) Ability to monitor project progress unclear; 3) Little evidence of fiscally responsible and healthy organization.

Budget Form & Narrative <i>Up to 10 points</i>	Exemplary-Strong (range: 10-7)	Good-Fair (range: 6-3)	Marginal-Weak (range: 2-0)
Budget Form: Uploaded Budget Template	Project budget template is complete.	Project budget template is partially complete.	Project budget template is incomplete.
Narrative: Is your project scalable? How will Cultural Trust funds be used?	Project income and expenses are described in detail.	Project income and expenses are described.	Project income and expenses are not described.
	Project revenue section indicates planned, pending or confirmed status.	Project revenue section indicates planned, pending or confirmed status.	Project revenue status incomplete. Cultural Development Grant
	Cultural Development Grant	Cultural Development Grant	Request amount not identified.
	Request amount identified. Request amount does not exceed 50% of	Request amount identified. Request amount does not exceed	In-Kind Contributions section unclear and/or reflects 100% of
	total project budget.	50% of total project budget.	required applicant income match.
	In-Kind Contributions section completed (as applicable). In-Kind contributions are less than 50% of	In-Kind Contributions section completed (as applicable). In-Kind contributions are not the majority	Total Project Expenses and Revenue do not equal.
	required applicant income match.	of required applicant income match.	Budget Narrative does not identify how Cultural Trust funds will be
	Total Project Expenses and Revenue equal.	Total Project Expenses and Revenue equal.	used and if the project is scalable.
	Budget Narrative clearly identifies how Cultural Trust funds will be	Budget Narrative identifies how	
	used and if the project is scalable.	Cultural Trust funds will be used and if the project is scalable.	



CULTURAL CREATIVITY

Supporting the Cultural and Creative Expression of Oregonians

Cultural Development Application: Category Assessment Rubric

Cultural Creativity projects support the cultural and creative expression of Oregonians. Cultural Creativity projects invest in creative work by supporting the development of artists, cultural experts or scholars. Cultural Creativity projects promote creative expression as a core part of vibrant communities with public exhibits/artistic residencies, cultural/artistic programming/productions/performances, commemorative works or special commissions, scholarly research and publications, and/or support for emerging creative leaders, among others.

Significance & Quality of Project	Exemplary-Strong	Good-Fair	Marginal-Weak
<i>Up to 10 points</i>	(range: 10-7)	(range: 6-3)	(range: 2-0)
Explain the significance of the project to your community and your organization.	Significance of creativity project to community and organization clearly defined.	Significance of creativity project to community and organization defined.	Significance of creativity project to community and organization poorly defined.
If funded, how will the project support the work developed by artists, cultural experts or scholars who promote creative expression as a core part of vibrant communities?	Project activities clearly support the work developed by artists, cultural experts or scholars. Selected artists, cultural experts or scholars are strongly engaged in promoting creative expression as a core part of their community.	Project activities support the work developed by artists, cultural experts or scholars. Selected artists, cultural experts or scholars are engaged in promoting creative expression as a core part of their community.	Project activities do not support the work developed by artists, cultural experts or scholars. Selected artists, cultural experts or scholars are not engaged in promoting creative expression as a core part of their community.
Community Impact & Public Benefit	Exemplary-Strong	Good-Fair	Marginal-Weak
<i>Up to 10 points</i>	(range: 10-7)	(range: 6-3)	(range: 2-0)
Describe the change that will result	Project specifically demonstrates	Project demonstrates meaningful public value and creative collaboration.	Project does not demonstrate
from this project. How will support for	meaningful public value and creative		meaningful public value and
creative expression impact your	collaboration.		creative collaboration.

community and your organization?	Project activities clearly designed to	Project activities are designed to	Project activities are not designed
Include intended outcomes and who will	engage artists, cultural experts or	engage artists, cultural experts or	to engage artists, cultural experts
benefit (include population/geographic	scholars in community-based creative	scholars in community-based	or scholars in community-based
scope).	expression.	creative expression.	creative expression.
If your organization has developed goals	If organization has identified diversity,	If organization has identified	If organization has identified
around diversity, equity and inclusion,	equity and inclusion goals, there is	diversity, equity and inclusion goals,	diversity, equity and inclusion
how does this project help achieve these	clear alignment with stated project	there is some alignment with stated	goals, there is little alignment with
goals?	goals.	project goals.	stated project goals.
<text><text><text><text></text></text></text></text>	Exemplary-Strong (range: 10-7) Evaluation plan clearly articulates why the project was determined to be successful. Evaluation plan in place to measure change over the funding period. Project-specific outputs and outcomes clearly defined. Explanation of organization and project management shows: 1) Staff and Board highly qualified; 2) Clear ability to monitor project progress; 3) Clear evidence of fiscally responsible and healthy organization.	Good-Fair (range: 6-3) Evaluation plan articulates why the project was determined to be successful. Project outputs and outcomes provided but not distinguished. Explanation of organization and project management shows: 1) Staff and Board reasonably qualified; 2) Adequate ability to monitor project progress; 3) Reasonable evidence of fiscally responsible and healthy organization.	Marginal-Weak (range: 2-0) Evaluation plan poorly articulates why the project was determined to be successful. Evaluation plan unclear. Project outputs and outcomes not defined. Explanation of organization and project management shows: 1) Staff and Board lacking appropriate qualifications; 2) Ability to monitor project progress unclear; 3) Little evidence of fiscally responsible and healthy organization.

Budget Form & Narrative <i>Up to 10 points</i>	Exemplary-Strong (range: 10-7)	Good-Fair (range: 6-3)	Marginal-Weak (range: 2-0)
Budget Form: Uploaded Budget Template	Project budget template is complete.	Project budget template is partially complete.	Project budget template is incomplete.
	Project income and expenses are		
Narrative: Is your project scalable? How will Cultural Trust funds be used?	described in detail.	Project income and expenses are described.	Project income and expenses are not described.
	Project revenue section indicates		
	planned, pending or confirmed status.	Project revenue section indicates planned, pending or confirmed	Project revenue status incomplete.
	Cultural Development Grant Request	status.	Cultural Development Grant
	amount identified. Request amount		Request amount not identified.
	does not exceed 50% of total project	Cultural Development Grant Request	
	budget.	amount identified. Request amount	In-Kind Contributions section
		does not exceed 50% of total project	unclear and/or reflects 100% of
	In-Kind Contributions section completed (as applicable). In-Kind	budget.	required applicant income match.
	contributions are less than 50% of	In-Kind Contributions section	Total Project Expenses and
	required applicant income match.	completed (as applicable). In-Kind contributions are not the majority of	Revenue do not equal.
	Total Project Expenses and Revenue equal.	required applicant income match.	Budget Narrative does not identify how Cultural Trust funds will be
		Total Project Expenses and Revenue	used and if the project is scalable.
	Budget Narrative clearly identifies how Cultural Trust funds will be used	equal.	
	and if the project is scalable.	Budget Narrative identifies how	
		Cultural Trust funds will be used and	
		if the project is scalable.	



STRENGTHEN CULTURAL CAPACITY

Strengthening Cultural Organizations

Cultural Development Application: Category Assessment Rubric

Strengthen Cultural Capacity projects build stability for cultural organizations and generate public confidence. Strengthen Cultural Capacity projects should reflect strategic investments in cultural organizations' capacity and/or improved sustainability by prioritizing new resources, thereby serving their community and deepening cultural impacts. New investments in organizational capacity/sustainability (staffing, equipment, marketing, development, online resources, building infrastructure, etc.) are eligible; requests for general operating support are not eligible.

Significance & Quality of Project <i>Up to 10 points</i> Explain the significance of this one-time, strategic investment to your organization. If funded, how will the project build your organization's capacity by increasing stability and/or improving sustainability? Is this an investment in your organization's programmatic or operational capacity?	Exemplary-Strong (range: 10-7)	Good-Fair (range: 6-3)	Marginal-Weak (range: 2-0)
	Significance of capacity project to organization clearly defined. Discrete project activities demonstrably increase organizational stability and/or improve sustainability. Clear investment(s) made towards the organization's programmatic or	Significance of capacity project to organization defined. Discrete project activities increase organizational stability and/or improve sustainability. Investment(s) made towards the organization's programmatic or	Significance of capacity project to organization ill defined. Generalized project activities may increase organizational stability and/or, improve sustainability. Unclear which investment(s) made towards the organization's
	operational capacity.	operational capacity.	programmatic or operational capacity.
Community Impact & Public Benefit <i>Up to 10 points</i>	Exemplary-Strong (range: 10-7)	Good-Fair (range: 6-3)	Marginal-Weak (range: 2-0)
Describe the change that will result from this project. How will a strategic investment in your organizational capacity impact your organization and	Project specifically demonstrates organizational growth in service to the community.	Project demonstrates organizational growth in service to the community.	Project does not demonstrate organizational growth in service to the community.

 the community you serve in the short and long term? Include intended outcomes and who will benefit (include population/geographic scope). If your organization has developed goals around diversity, equity and inclusion, how does this project help achieve these goals? 	Project activities clearly designed to improve organizational performance in the short and long term. If organization has identified diversity, equity and inclusion goals, there is clear alignment with stated project goals.	Project activities designed to improve organizational performance in the short and long term. If organization has identified diversity, equity and inclusion goals, there is clear alignment with stated project goals.	Project activities are not designed to improve organizational performance in the short and long term. If organization has identified diversity, equity and inclusion goals, there is little alignment with stated project goals.
Project Management & Evaluation <i>Up to 10 points</i>	Exemplary-Strong (range: 10-7)	Good-Fair (range: 6-3)	Marginal-Weak (range: 2-0)
 Who will measure the project's success and what indicators will they use? Please describe project outputs (number of participants, demographics, deliverables) and outcomes (changes in engagement, barriers, value of culture). Describe the qualifications of your staff and board to evaluate project success and provide strong organizational/fiscal management. 	Evaluation plan clearly articulates why the project was determined to be successful. Evaluation plan in place to measure change over the funding period. Project-specific outputs and outcomes clearly defined. Explanation of organization and project management shows: 1) Staff and Board highly qualified; 2) Clear ability to monitor project progress; 3) Clear evidence of fiscally responsible and healthy organization.	Evaluation plan articulates why the project was determined to be successful. Project outputs and outcomes provided but not distinguished. Explanation of organization and project management shows: 1) Staff and Board reasonably qualified; 2) Adequate ability to monitor project progress; 3) Reasonable evidence of fiscally responsible and healthy organization.	Evaluation plan poorly articulates why the project was determined to be successful. Evaluation plan unclear. Project outputs and outcomes not defined. Explanation of organization and project management shows: 1) Staff and Board lacking appropriate qualifications; 2) Ability to monitor project progress unclear; 3) Little evidence of fiscally responsible and healthy organization.

Budget Form & Narrative <i>Up to 10 points</i>	Exemplary-Strong (range: 10-7)	Good-Fair (range: 6-3)	Marginal-Weak (range: 2-0)
Budget Form: Uploaded Budget Template	Project budget template is complete.	Project budget template is partially complete.	Project budget template is incomplete.
	Project income and expenses are		
Narrative: Is your project scalable? How will Cultural Trust funds be used?	described in detail.	Project income and expenses are described.	Project income and expenses are not described.
	Project revenue section indicates		
	planned, pending or confirmed status.	Project revenue section indicates planned, pending or confirmed	Project revenue status incomplete.
	Cultural Development Grant Request amount identified. Request amount	status.	Cultural Development Grant Request amount not identified.
	does not exceed 50% of total project budget.	Cultural Development Grant Request amount identified. Request amount	, In-Kind Contributions section
		does not exceed 50% of total project	unclear and/or reflects 100% of
	In-Kind Contributions section completed (as applicable). In-Kind	budget.	required applicant income match.
	contributions are less than 50% of required applicant income match.	In-Kind Contributions section completed (as applicable). In-Kind contributions are not the majority of	Total Project Expenses and Revenue do not equal.
	Total Project Expenses and Revenue equal.	required applicant income match.	Budget Narrative does not identify how Cultural Trust funds will be
		Total Project Expenses and Revenue	used nor if the project is scalable.
	Budget Narrative clearly identifies how Cultural Trust funds will be used	equal.	
	and if the project is scalable.	Budget Narrative identifies how Cultural Trust funds will be used and if the project is scalable.	



Fall 2024 Cultural Coalition Survey Initial Findings

Coalition Leadership Council January 31, 2025



67 Participants

Participation

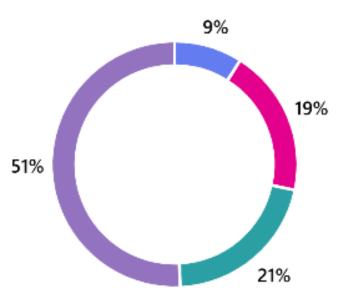
Ра	rticipating	15. Lincoln
Counties:		16. Linn
1.	Clatsop	17. Marion
2.	Coos	18. Morrow
3.	Crook	19. Multnomah
4.	Washington	20. Polk
5.	Curry	21. Sherman
6.	Deschutes	22. Tillamook
7.	Gilliam	23. Umatilla
8.	Harney	24. Wasco
9.	Hood River	25. Wheeler
10.	Jackson	26. Yamhill
11.	Josephine	
12.	Klamath	
13.	Lake	

14. Lane



3. Length of time as Coalition Member

•	less than 6 months	6
•	1-2 years	13
•	2-4 years	14
	4+ years	34

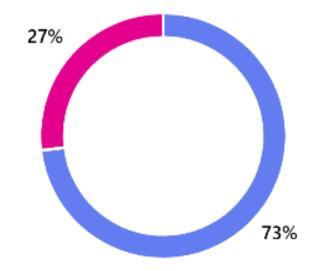




4. Is your Coalition administered as a

fiscally spon	sored volunteer board	49
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- a 501 c 3 nonprofit 18
- a federally recognized Tribe/program
 0



CULTURAL TRUST

What do you see as your Coalition's greatest challenges?

1. Coalition Administration

- a. Final Report Collection
- b. Grant Management- need a proper system
- c. Adapting application and meeting needs of applicants
- d. Maintaining low operating costs as needs rise
- e. Fiscal sponsorships are harder to secure
- f. Need more capacity to meet growth and community demands; need increased wrap-around admin support
- g. Significant delays in receiving Coalition funds

2. Fundraising

- a. More requests than funds
- b. Diversifying/increasing local financial support for culture
- c. With access to arts diminishing in rural communities (less art in schools, local galleries, etc.), making the case and increasing access with more funding
- d. Want more capacity to do community outreach and advocacy

3. Marketing

- a. Greater local awareness of Coalition grant opportunities and impact
- b. Greater local awareness and participation in Cultural Tax Credit
- c. Greater local connections with cultural donors
- d. Greater communication with prospective grant applicants
- e. Need more support to meet the requirements of Trust Communication Agreements
- 4. Recruiting/Retaining Coalition Members
 - a. Onboarding/training new members
 - b. Assigning officers, roles and responsibilities
 - c. More support to professionalize our work and create opportunities to do strategic (cultural) planning, evaluate our programs, etc.
 - d. Volunteerism is down; how to incentivize Coalition membership

CULTURAL TRUST

What do you see as your Coalition's greatest opportunities?

• Outreach & Advocacy

- Increase awareness and participation in Coalition programming
- Increase engagement in local/regional cultural programming
- Drawing attention to, and celebrating, the work of grant recipients
- Direct engagement with more cultural nonprofits in our County
- Sharing success stories regularly and broadly
- Showing the public the diversity of culture
- Increasing awareness of cultural organizations and events in our community

Next slide...

CULTURAL TRUST

What do you see as your Coalition's greatest opportunities, continued...

- Supporting the next generation of arts and culture champions
 - Newer Coalition members create the opportunity for new leadership, vision, innovation, and resources to take the work of the Trust and Coalition forward
 - Connecting to local culture, inclusive of the work that schools and small businesses do to support arts and culture in rural areas with their specific economies and industries
 - Local enthusiasm for youth programming can and should be harnessed
 - Providing more support for small/new cultural nonprofits to grow and succeed
 - Support for historically underrepresented artistic/cultural endeavors
 - Diversifying Coalition membership to include broad representation by cultural sector, age, and experiences
 - Harness the passion, talent and dedication of our board members!
- Maximizing our Impact
 - Creating more opportunities to help leverage Coalition funding for greater support from large foundations and community-based donors
 - Partnering with major cultural groups in our County
 - Networking with local community programs
 - More funding for more culture!
 - Strengthening existing, and creating new, partnerships with cultural groups
 - Increase support for culture outside of annual grant making
 - With increased capacity, explore our potential for cooperation and shared resources amongst Coalitions to streamline administrative work while increasing our support for artists, cultural workers, and community vibrancy Page 74 of 118

CULTURAL TRUST

What are your goals as a Coalition member?

- Increase support for Cultural Community
 - Increase funding amounts and levels
 - Support our community organizations in meaningful ways
 - Create more opportunities for, and exposure to, arts and culture
 - Increase number of new applicants
 - Promote equity and inclusion in our sector
 - Promote our arts and culture ecosystem
 - As Coalitions, connect artists and cultural organizations to resources
 - Increase support for heritage organizations and activities

Next slide...

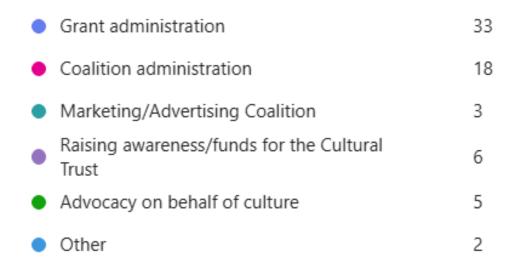


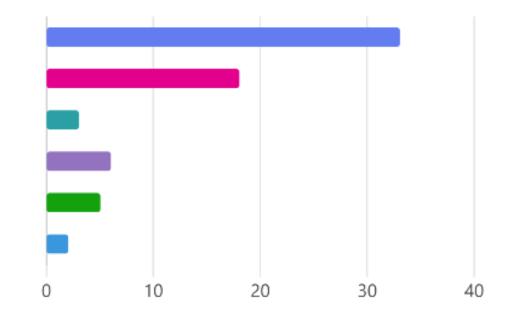
What are your goals as a Coalition member, continued...

- Thriving and Connected Cultural Coalition
 - Support the mission and goals of our Cultural Plan and our Coalition members
 - Foster connections with diverse peoples and projects that support art, culture and heritage
 - Foster our work as Coalition members as a team and to be present, collaborative, fair and transparent while building succession plans for the future
 - Define and support member roles, responsibilities, and commitment to the work; advisory members for mentorship
 - Simplify and document Coalition processes for consistency, efficiency, and set-up new members for success
 - Improved communication resources and activities
 - To provide the best stewardship of Coalition funds with improved access to funding while improving our internal structures and operations
 - Recruit new Coalition members
 - Access to training!
- Advocacy for Arts, Heritage and Humanities
 - Increase publicity of our work and that of our grant recipients
 - Advocate for our sector at the local and state level
 - Advocate for, and develop, more resources for culture
 - Opportunities as Cultural Ambassador



8. As a Coalition member, which task(s) do you spend the majority of your time on:

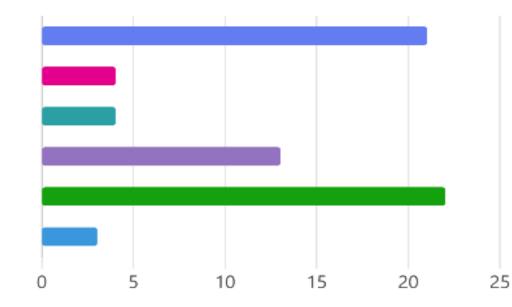






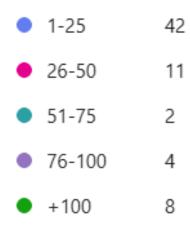
9. As a Coalition member, which task(s) would you prefer to spend the majority of your time on:

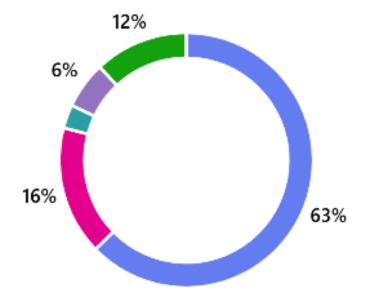
•	Grant administration	21
•	Coalition administration	4
•	Marketing/Advertising Coalition	4
•	Raising awareness/funds for the Cultural Trust	13
•	Advocacy on behalf of culture	22
•	Other	3





10. What is the average number of applications your Coalition receives per grant cycle?

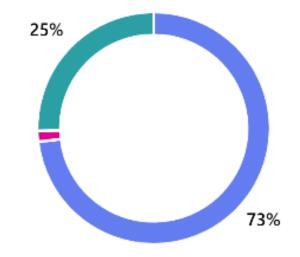






11. During the COVID 19 public health crisis, Coalitions played a critical role in administering cultural relief funds. If the o portunity to administer additional funding for culture occurred, would your Coalition wish to participate?

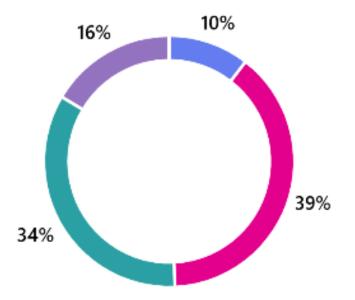






12. How do you manage your grant program?

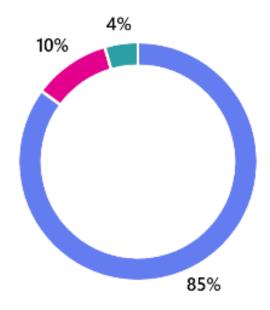
•	Paper applications	7
•	Electronic applications	26
•	Online grant platform	23
	Other	11





13. Does your Coalition/Tribal Program have a website?

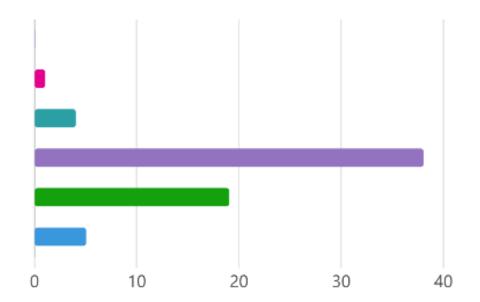






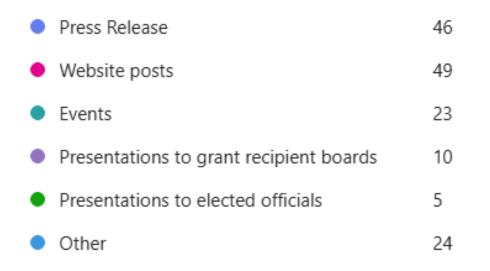
14. How often is your website updated?

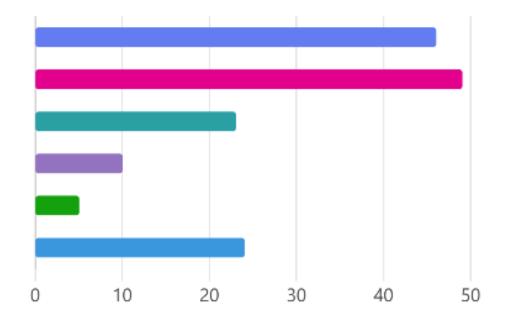
•	Daily	0
•	Weekly	1
•	Monthly	4
•	Seasonal	38
•	Yearly	19
•	Never	5





15. How does your Coalition communicate its programs and activities?

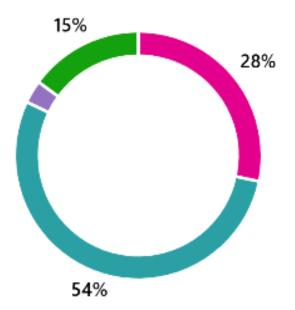






16. How often does your Coalition meet?

•	Weekly	0
•	Monthly	19
•	Seasonal	36
•	Yearly	2
•	Other	10

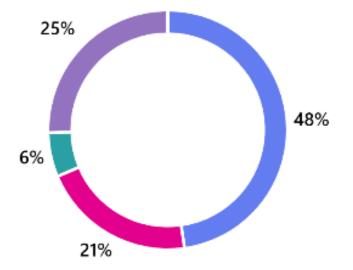




17. When was your Cultural Plan last updated?

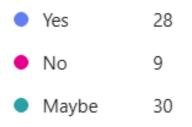
•	In the last 2 years	32
•	In the last 5 years	14
•	In the last 10 years	4

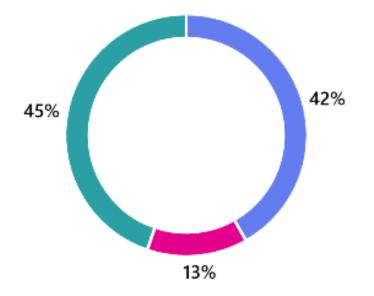
Don't know 17





18. Does your Coalition have sufficient capacity to pursue the goals of its Cultural Plan?







If no, what investments would allow you to pursue the goals of your Cultural Plan?

- Improved grant application/management system
- Coordinated statewide advertising for Coalition grant opportunities to support grass roots efforts
- Individual Coalition capacity to dedicate time and energy to Coalition work
- Paid administrative support
- 501 c 3 status to increase fundraising opportunities
- Shared Coalition resources amongst neighboring Counties
- Annual Coalition member meetings
- Support for updating our Cultural Plans
- Improved marketing tools, including support for Coalition websites and communications
- DEI training
- More funding for grants



20. Please rank your Coalition's areas of greatest need for support:

- 1 Coalition member recruitment
- 2 Grant administration
- 3 Coalition administration
- 4 New member training/orientation/leadership development
- 5 Marketing/Communications
- 6 Fundraising
- 7 Increased access to administrative funds
- 8 Diversity, Equity and Inclusion policies
- 9 Updating Cultural Plan
- 10 Other



If "other", please describe:

- More funding
- Support for building awareness
- Coalition member mentoring, including from each other
- Recruiting Coalition members, especially youth and people of color
- Managing our Coalition's historical documents
- Part-time, paid administrative assistant
- Access to administrative resources- platform solutions, software, other tools
- Timely payment of Coalition grant award, before the end of the calendar year in which they were awarded
- More fundraising



Coalition Survey next steps:

- Analyses
- Priorities
- Timelines
- Recommendations to the Cultural Trust Board



February 27, 2025

TO:	Cultural Trust Board Members
FROM:	Aili Schreiner, Cultural Trust Manager
SUBJ:	Strategic Plan Updates

The following are current initiatives (FY2025, Quarters 2 and 3) supporting the approved strategic plan.

As a reminder, the state's fiscal year is structured as the following: Q1 = July, August, September; Q2 = October, November, December; Q3 = January, February, March; Q4 = April, May, June.

> Strategic Plan Activities: FY2025 Quarter 2 and 3

ADVANCEMENT:

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

- Objective A: Engage and inform legislative advocates and partners
 - February Arts & Culture Caucus Kick-off Event
 - FY2025 award notifications by districts to electeds
 - Planning for April Arts & Culture Advocacy Day
 - \circ $\,$ Meetings with CACO for the 2025 legislative session.
- Objective B: Promote the impact and value of Oregon's diverse cultural network
 - Cultural Ambassador Network support for Campaign season
 - Over 90+ Board Presentations on impact and use of Cultural Tax Credit
- Objective C: Increase annual cultural funding by engaging prospective and existing donors
 - (See full campaign report in board packet for details)
 - \circ Work with contractors to plan and execute year-round campaign
 - +3.2% increase in donations in 2024
 - \circ +2.1% increase in number of donors in 2024
 - FY2025 Conversations with Funders
 - Sales of license plate holding mostly steady

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
 - Changes to FY2026 Cultural Development Grant Program as recommended by CDV work group
 - Staff participation in agency planning process to identify new grants management system is ongoing
 - Improvements to grant application review processes based on community input ongoing (e.g. changes to OPD program)
 - Coalition Leadership Council reviewed Coalition Survey Results, meeting in March/April to discuss next steps
- Objective B: Strengthen Oregon's cultural network of County and Tribal Cultural Coalitions
 - Quarterly Coalition Meet-Ups
 - Coalition Leadership Council Meet-Ups; Coalition survey issued in October. The Leadership Council met in January to review survey results and will discuss next steps/identify priorities at their next meeting (See results in board packet).
 - Added the Klamath Tribe and Confederated Tribes of Siletz to recipients of Tribal Coalition funding
- Objective C: Fully engage the five Cultural Trust Partners to develop strategic statewide investments
 - FY2025 Conversations with Funders
 - Discussions on hosting a cultural nonprofit/Coalition gathering in 2026 to coincide with Trust's 25th anniversary, supported in part with Partner funding
 - Monthly Partner meetings to improve the scope and impact of Cooperative Funding opportunities, with emphasis on projects with statewide impact and leveraging federal funding.
- Objective D: Expand services to Cultural Nonprofit network (CNP)
 - Survey CNPs when the Trust has added its new staff
 - Updates to CNP toolkit added to FY2025 marketing contract scope of work
 - Ongoing media postings on CNP grant award impact
 - FY2025 Conversations with Funders
 - Setting board presentations with newly added cultural nonprofits to introduce them to the Trust and the Cultural Tax Credit
- Objective E: Expand and strengthen strategic partnerships
 - Cultural Ambassador Network
 - FY2025 Conversations with Funders
 - Educational opportunities in the lead-up to April Arts & Culture Advocacy Day

RESOURCES: Maximize the effectiveness of the Cultural Trust

- Objective A: Increase and modernize the Cultural Trust's ability to serve Oregonians
 - Administrative Assistant position filled- welcome Rachel Blair!
 - Cultural Trust Grants Officer position created, filled by Raissa Fleming!
 3-month transition time to new positions
 - Modernize grant and donor management systems as permitted by OBDD
 - Changes to CDV grant program to aid in more efficient administrative processes
- Objective B: Increase Board and volunteer engagement and commitment to supporting culture
 - Working Group exploring Semi-Independent status with Arts Commission
 - Board Committee work- ad hoc CDV work group developed recommendations for program area (see Program report in board packet)
 - Cultural Coalition Survey results to identify strategies and support needed for 36 County Cultural Coalitions and 9 federally recognized Tribes
 - Requesting Board presentations for newly added eligible cultural nonprofits.

Requested Action:

- Informational only 🔀
 - For board input/discussion

For board action

Oregon Cultural Trust Strategic Plan FY2024-2026

ADVANCEMENT Champion Oregon's arts, heritage and humanities Sector to serve all Oregonians	FY24 Q2	FY24 Q3	FY24 Q4	FY24 Status	FY25 Q1	FY25 Q2	FY25 Q3	FY25 Q4	
Sector to serve all Oregonians Objective A: Engage and inform legislative advocates and par	tners				<u> </u>				1
	ions:								
Elevate Oregon's cultural sector as a legislative priority by establishing the Arts and Cu Ci	Iture Jucus			\checkmark					~
Provide the Arts and Culture Caucus with access to data and cultural e	vents				Updating membership list		February Arts & Culture Caucus Legislative Session Kickoff Event		
Provide regular and strategic communication with legislators on the impact of the Cu Trust's funding of the cultural s		OAC, CACO, OCT Mtgs for future Caucus activities	OAC, CACO, OCT Mtgs for future Caucus activities; Sen. Anderson Caucus Co-Chair		Legislative Days Breakfast for Culture Caucus (9/24)		District Funding Letters to Legislators		
Improve awareness of Oregon's Cultural Tax Credit among elected officials at the loca state					Award Notifications to electeds		Cultural Caucus Event; District Funding Letters		
Cultivate strategic partnerships with local and statewide organize	tions				Collaborate with CACO on constituent listening sessions?		April 14 Cohort Support Event; 2025 Conversations with Funders		
Collaborate with cultural statewide service agencies to set and present legislative price	rities	OCT, OAC, CACO Mtgs for '25 session	OCT, OAC, CACO Mtgs for '25 session		OCT, OAC, CACO Mtgs for '25 session	CACO, OCT, OAC Leadership Meetings	February Arts & Culture Caucus Legislative Session Kickoff Event		
Objective B: Promote the impact and value of Oregon's diverse cultural net	work								
, , , ,	ions:								T
Develop a diversity, equity, accessibility and inclusion plan that is responsive to all regineration the	ns in Approved by state Board 12/20/23			~					~
Create an educational/community advocate Cultural Ambassador program to engage cu leaders and donors to promote the Cultural Trust and tax		Added to FY25 marketing consultant scope			Launches August 2024	Recruited & Launched	Supported end-of-year campaign		
Promote the arts, heritage and humanities as essential to community and ecor develop	AEP6 promotion	AEP6 promotion			AEP6 promotion: Eastern OR Tour; Community presentations	100+ Seasonal Board Presentations	100+ Seasonal Board Presentations		
Communicate cultural expression as a vital and integral element of healthy commu	nities AEP6 promotion	AEP6 promotion			AEP6 promotion: Eastern OR Tour; Community presentations	Regional presentations	Regional presentations		
Objective C: Increase annual cultural funding by engaging prospective and existing de	nors								
Ac	ions:								
Develop marketing and outreach strategies that increase donor contribution	tions			_	Marketing Consultants work begins	early launch of Fall Campaign; strong collaboration amongst contractors	Campaign Review; Launching 2025 Campaign early		
Increase number of donors by 5-7% and	ually			-4% decrease from FY23		Fall Campaign	Increase of 2.1%		
Increase total donations annually by 5-7%, adjusting for inf	ation			6% increase from FY23		Fall Campaign	Increase of 3.2%		
Increase impact of tax credit limit in the 2025-27 legislative se	ssion				Priority for '27 session (timed with sunset)	Priority for '27 session (timed with sunset)	Priority for '27 session (timed with sunset)		
Work with cultural funders to increase funding to the s	ector				Ongoing	Ongoing	Ongoing; Conversations with Funders		
Maintain or increase sales of the Cultural Trust license plate each	year	Digital Marketing Campaign; New Mover Mailings		37% increase from FY23	Digital Marketing Campaign, New Mover Card Campaign	Maintaining Sales	Maintaining Sales		

Oregon Cultural Trust Strategic Plan FY2024-FY2026

CAPACITY Increase capacity and access to resources by investing in CULTURAL Oregon's arts, heritage, and humanities sector	FY24 FY24 Q2 Q3	FY24 Q4	FY24 Status	FY25 Q1	FY25 Q2	FY25 Q3	FY25 Q4	FY25 Status
Objective A: Assess grant programs to respond to and support the evolving needs of the cultural sector								
Actions:								
Review and implement a new grants management system to improve access to communities across the state	EDMS with BizOR	EDMS with BizOR	Ongoing	EDMS with BizOR	Exploring new system, continued work	Exploring new system, continued work depending on permission by OBDD		
Improve grant application review processes based on community input	FY25 CDV Guidelines/Support/Application		Ongoing	Ongoing- changes to OPD program	CDV Workgroup; Coalition Leadership Council	CDV Workgroup; Coalition Leadership Council		
Conduct a cultural service and support gap analysis to determine potential unmet needs					CDV Workgroup; Coalition Leadership Council	CDV Workgroup; Coalition Leadership Council		
In response to the cultural service and support gap analysis, review and revise grant programs					CDV Workgroup; Coalition Leadership Council	CDV Workgroup; Coalition Leadership Council		
Integrate diversity, equity, inclusion and accessibility objectives into grant programs to broaden access to funding	FY25 CDV Guidelines/Support		Ongoing	Coalition Leadership Council	CDV Workgroup; Coalition Leadership Council	CDV Workgroup; Coalition Leadership Council		
Objective B: Strengthen Oregon's cultural network of County and Tribal Cultural Coalitions								
Actions:				1				
Convene quarterly Coalition meetings to share information and provide support	✓ ✓	✓	\checkmark	Ongoing	Ongoing	Ongoing		
Survey Coalitions for long-term needs		Coalition Leadership Council	Ongoing	Ongoing	Survey issued in October	Survey Results Analyzed; priorities and recommendations at March meeting		
Develop rural outreach programs in coordination with Coalitions		Coalition Leadership Council	Ongoing	Ambassador Program	Ongoing- regional cohort work	Ongoing- regional cohort work		
Implement Coalition capacity building process, including administration, grants management system, marketing and communication support, and updating cultural plans		Coalition Leadership Council	Ongoing	Coalition Leadership Council; increased Coalition base funding and admin amount	Analysis and response to Coalition Survey Results; 1:1 capacity building work	Analysis and response to Coalition Survey Results; 1:1 capacity building work		
Ensure all nine federally recognized tribes receive Coalition awards		Coalition Leadership Council	Ongoing	Coalition Leadership Council	Onboard Siletz & Klamath Tribes, reengaged with CTCLSI & Coquille Tribes	Ongoing- 2 Tribes added in FY25		
Objective C: Fully engage the five Cultural Trust Partners to develop strategic statewide investments Actions:			1	1	1			4
Support Cooperative Partner grantmaking initiatives that invest in the field, including trainings and workshops	2024 Conversations with Funders	Planning for Fall of '24		Convo with Funders at OMA Conference, virtual, southern Oregon	OPD Program; monthly Partner meetings	FY25 Conversations with Funders		
Explore hosting cultural gatherings every two years for organizations and individuals				Possible FY25 Partner-funded program	paused for fundraising	April Co-hort meeting, setting Coalition goals		
Engage Partners in annual fundraising efforts				Set Partner Board Presentations, Toolkit	Set Partner Board Presentations, Toolkit	Monthly Partner Meetings		
Objective D: Expand services to Cultural Nonprofit network (CNP)		1	1	1	T			4
Actions: Survey and research CNP needs and opportunities				Survey when new staff position onboard	CNP applications	CNP applications	Audit & Survey CNPs	
Create and implement a CNP toolkit that supports the work of cultural nonprofits while advocating for the Cultural Tax Credit	Added to FY25 marketing consultant scope			Toolkit created with consultants		Coalition Survey Results	Survey Results Analyzed; priorities and recommendations at March meeting	~
Share CNP impact stories in communication and advocacy work	Social & Web postings Social & Web postings	Social & Web postings		Social & Web postings	ongoing	ongoing	Featured stories on social media	
Develop workshops and educational trainings for CNPs		Planning for Fall of '24		Toolkit created with consultants	pause for fundraising	Conversations with Funders and Service Providers	Audit & Survey CNPs	
Objective Fr French and share the set of the								
Objective E: Expand and strengthen strategic partnerships Actions:			1	1		1		
Continue to explore fundraising partnerships				Ambassador Program; Willamette Week Give Guide			Explore in FY2026	
Serve as a leader, advisor and convener for the cultural community	2024 Conversations with Funders			2025 Conversations with Funders: Fall		Arts & Culture Caucus; Conversations with Funders	Legislative Advocacy Day(s)	

RESOURCES		Oreg	on Cultura	al Trust					
			trategic P						
DECOUDEEC	51/24		(2024-FY2		EVOE	EV/2E	EV2E	EV/2E	EV2E
RESOURCES	FY24	FY24	FY24	FY24	FY25	FY25	FY25	FY25	FY25
CULTURAL Maximize the effectiveness of the Cultural Trust	Q2	Q3	Q4	Status	Q1	Q2	Q3	Q4	Status
ijective A: Increase and modernize the Cultural Trust's ability to serve Oregonians	1			1					1
Actions:									
Revise administrative spending cap set in statute through legislative process to remove the \$400,000 cap and replace with percentage of permanent fund		Approved in '24 short session		\checkmark					~
Review current capacity and staffing structure					In Progress	Seasonal Temps hired	Administrative Assistant hired; Cultural Trust Grant Officer position created	Transition to new positions to be completed	
Request additional positions for administration and campaign support in the legislative process					2027 Session Discussion			Explore in FY2026	
Modernize grant and donor management systems					EDMS with BizOR			Exploring new system, ongoing as permitted by OBDD	
Objective B: Increase Board and volunteer engagement and commitment to supporting culture	1								
Actions:					l l				
Develop Board Committees to focus on capacity building, governance, marketing/communication and DEIA					Joint Committee for Semi- Independence	CDV Workgroup; Joint Committee for Semi-Independence	CDV Workgroup; Joint Committee for Semi-Independence		
Build relationships with cultural nonprofit board members and grantees			Set CNP Board Meetings		Ambassador Program	over 90 Board presentations	Coalition Surveys for next steps	Survey Results Analyzed; priorities and recommendations at March meeting	
Develop educational trainings for CNPs to promote the Cultural Tax Credit			Set CNP Board Meetings		Ambassador Program; Toolkit Dev't	Scheduling board presentations with added CNPs	ongoing		



February 23, 2023

TO:Cultural Trust Board MembersFROM:Brian Rogers, Executive DirectorSUBJ:Executive Director Report

Legislative Session

Below is the list of legislative bills currently being discussed

HB3189 Appropriates moneys from the General Fund to the Oregon Business Development Department for the purposes of the Oregon Arts Commission. Increases the Arts Commission budget from \$4.4 million to \$10 million. May also be amended to provide \$5.6 million in one-time funding to: Oregon Symphony, Oregon Ballet Theatre, Oregon Shakespeare Festival, Portland Art Museum, Portland Center Stage and the Portland Opera.

Status: 02/17/25 - Public Hearing held.

01/17/25 - Referred to Economic Development, Small Business, and Trade with subsequent referral to Ways and Means.

01/13/25 - First reading. Referred to Speaker's desk.

HB3191 Appropriates moneys to support arts and cultural organizations in Oregon. Cultural Resources Economic Fund (CREF), build, restore, and preserve Oregon's community treasures. The peer-reviewed CREF slate designates 14 projects as ready for state funding for a total of \$9.325 million. Full list of projects is attached

Status: 02/17/25 - Public Hearing held.

01/17/25 - Referred to Economic Development, Small Business, and Trade with subsequent referral to Ways and Means.

01/13/25 - First reading. Referred to Speaker's desk.

HB3048 Requires the Oregon Business Development Department to study arts and culture in this state. This is the semi-independent and merger bill.

Status: 01/17/25 - Referred to Economic Development, Small Business, and Trade. 01/13/25 - First reading. Referred to Speaker's desk.

HB3329 Increases the amount of total tax credits allowed for certified film production development contributions made to the Oregon Production Investment Fund.

Status: 02/19/25 - Public Hearing held.

02/17/25 - Public Hearing held.

01/24/25 - Referred to Economic Development, Small Business, and Trade with subsequent referral to Revenue.

Media Coverage:

Oregon Legislature's	Arts Caucus	rolls out	its five-bill	agenda fo	or the	current s	session •	Oregon
ArtsWatch				-				-

<u>Can a merger of two Oregon agencies bring stability to arts and culture funding in the Trump era? -</u> <u>oregonlive.com</u>

Monday, April 14, 2025 Joint Meeting with Arts Commission

Type: In Person Time: 10:00am to 1:30pm Location: Salem

2:00pm to 4:00pm: Cohort - Coalition Gathering

4:30pm Community Reception

TBA: Dinner

Tuesday, April 15, 2025 Arts Advocacy Day

Time: 8:00am to 1:00pm Location: State Capitol Building

Requested Action: Sequested Action: For board input/discussion For board action

Board of Directors

Jordan Anderson, *Treasurer* OPB

Chris Ayzoukian Reser Center for the Arts

Peter Bilotta, Chamber Music Northwest

Carissa Burkett North Pole Studio

Gabriella Calicchio, OSF

Jennifer Cole, PNCA

Adam Davis, OR Humanities

Sue Dixon, *Vice President* Portland Opera

Cassie Greer, artist

Emily Hartlerode Oregon Folklife Network

Jeff Hawthorne City of Portland

Shane Jewell, OBT

Lisa Lipton, 45th Parallel

Jenn Hartman Luck Oregon Children's Theatre

Judy Margles

Isaac Marquez City of Eugene

Mario Mesquita, *Secretary* RACC

Josh Neckles, Eugene Ballet

Dave Moss Eugene Symphony

Rachel Record, PAM

Ginger Savage Crossroads Carnegie Art Center

Dan Thorndike

Kimberly Howard Wade Caldera

Steve Wenig, OR Symphony

Dana Whitelaw, *President* High Desert Museum

Nicole Yasuhara, OHS



2025-27 Policy Priorities

- 1. Improve Access to State Funding for Arts/Culture Providers: Increase the grants budget of the Oregon Arts Commission to \$10 million, largely benefitting the small to mid-size providers across the state. This more than doubles the current grant budget. The largest grant possible from these funds per applicant is \$25,000.
- 2. Provide Capital to full CREF Slate -- 14 Arts/Culture Community Projects: Through the Cultural Resources Economic Fund (CREF), build, restore, and preserve Oregon's community treasures. The peer-reviewed CREF slate designates 14 projects as ready for state funding for a total of \$9.325 million. Projects range from \$150,000 to \$2 million and represent the geography of Oregon including Coos Bay, Jacksonville, Mt. Hood, Ashland, Salem, Bend and others. Each project is essential to the vibrancy of Oregon's cultural landscape honoring geographical and cultural diversity we urge its adoption in full.
- 3. Support One-Time Funding for Large Arts Organizations. Complete a pledge to Oregon's large arts organizations of \$5.6 million in one-time funds to match a private philanthropic commitment from the Oregon Community Foundation and the James F. and Marion L. Miller Foundation. Large arts include: Oregon Symphony, Oregon Ballet Theatre, Oregon Shakespeare Festival, Portland Art Museum, Portland Center Stage and the Portland Opera.
- 4. Encourage Investment in Preservation and Reuse of Historic Properties: Partner with Restore Oregon to reauthorize the recently expired special assessment for historic properties program which allows a discounted assessment for a historic property for ten years in exchange for making appropriate improvements to the property.
- 5. Create an Oregon State Song Anthology: As part of the America 250 Oregon Commission (SB 1531, passed in 2024), establish a larger collective of music celebrating the diversity and community of our state, as part of Oregon's official observance of the 250th anniversary of the founding of the United States. Activate Arts is the creator of this concept. This is an advocacy approach to the Commission rather than a legislative concept.



The Cultural Advocacy Coalition of Oregon received 24 applications for 2023-25 Cultural Resources Economic Funds (CREF) for arts and culture capital projects across the state. We evaluated these applications for readiness for state investment in an extensive peer review process and with expertise from the Oregon Arts Commission and the Oregon Cultural Trust.

We recommend the following package of 14 projects totaling \$9.325 million because of their geographic and cultural diversity, economic and community impact, and viability in expanding access to arts and culture.

B17 Alliance Foundation, Salem \$350,000: Hangar purchase for iconic B-17G



Funds will be used to purchase Hangar C, home of the B-17G Lacey Lady and its museum, ensuring stability for ongoing restoration and education efforts. Located near an aviationfocused high school, this acquisition supports youth engagement, hands-on learning, and the continued work of over 100 volunteers, many of whom are veterans.

Columbia River Maritime Museum, Astoria \$700,000: Mariners Hall project



Mariners Hall will boost the North Coast's economy and quality of life with cultural and educational experiences. The new building will feature maritime heritage displays, youth-focused STEM exhibits, and Indigenous exhibits. With expanded parking, Mariners Hall will attract more visitors, supporting local businesses and enriching thousands of students' education.

Coos Art Museum, Coos Bay \$325,000: Restore and revamp museum



CREF funding will restore and revamp the only art museum on the Oregon Coast, located in downtown Coos Bay. This facelift will make the Art Deco building more accessible and foster a vibrant cultural hub in rural Oregon.

Eastern Oregon Regional Theatre, Baker City \$600,000: Baker Orpheum Theatre renovation



Eastern Oregon Regional Theatre is renovating an 1889 historic theater building on Main Street in Baker City to serve local performing artists and attract national touring groups. During demolition they discovered there had never been a basement in this space. This grant will fund basement construction on concrete micro-piles reaching 72 feet to bedrock required for seismic stability.

High Desert Museum, Bend \$2 million: Addition and renovation



The High Desert Museum plans a new wing to meet growing demand in Central Oregon, featuring new gathering spaces, a dedicated art gallery, and classrooms, doubling educational capacity. It will also renovate the exhibition dedicated to Indigenous cultures. Opened in 1982, the museum attracts 225,000 visitors annually, contributing \$20 million to the local economy.

Historic Jacksonville, Jacksonville \$150,000: Museum Without Walls project



Jacksonville's "Museum without Walls" project will transform the 1881 Old City Hall into a museum hub with interactive exhibits, sharing the town's history and guiding visitors on how to explore the National Historic Landmark District through physical and virtual tours.

Maxville Heritage Interpretive Center, Joseph \$300,000: Site development for education



The Maxville Townsite, listed on the National Register of Historic Places, provides one of the few windows into the migration of African Americans to the Pacific Northwest at a time when exclusionary laws and sundown codes were in place. Restoration, infrastructure upgrades, and additional funding will expand educational programs, tourism, and internships, engaging over 13,000 people annually. Page 102 of 118

Mt Hood Cultural Center and Museum, Government Camp \$450,000: Building expansion



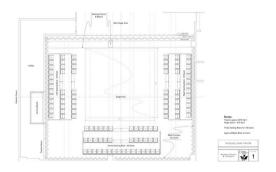
This project is Phase 1 of a three-phase facility expansion. It provides more archival storage and literally creates the structural footings to support the other two expansions. The full facility expansion provides a larger community space, enlarged galleries, a research library, and an expanded store.

Museum at Warm Springs, Warm Springs \$1.5 million: Renewal and exhibit updates



The permanent exhibit "speaks" to the museum visitor as well as to Tribal members of all ages as a testament of their origins, relationships, Tribal sovereignty, and immutable values. The goal is the evolving permanent exhibit will incorporate state-of-the-art technology and infrastructure that is maintainable and renewable.

Oregon Shakespeare Festival, Ashland \$375,000: Black Swan Theatre renovation



The Oregon Shakespeare Festival needs a space for its New Works commissioning program. The Black Swan Theatre, last upgraded in 1976 and decommissioned in 2002, requires significant renovations, additions, and ADA accommodations to become usable again for readings, workshops, and development of new theatrical works.

PHAME, Portland \$600,000: New building



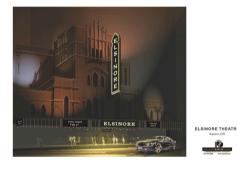
PHAME has a bold vision: a one-of-a-kind, fully accessible, state-of-the-art arts and community space for people with intellectual and developmental disabilities. This new home will empower adults with intellectual and developmental disabilities to reach their artistic potential and will show that people with developmental disabilities are valued in our community as artists and human beings,

Salem Art Museum, Salem \$175,000: Re-imagining Bush House Museum



The Salem Art Association is undertaking a multi-phase project to preserve and reinterpret the historic Bush House Museum. The goals are to provide a more inclusive account of its inhabitants and staff, preserve the house and furnishings, and expand ADAcompliant accessibility for all visitors.

The Historic Elsinore Theatre, Salem \$350,000: Renovation of theatre/new signage



As its 2026 centennial nears, the Elsinore Theatre is restoring historic façade features, including a 23-foot lighted vertical blade sign, missing since 1962, and Gothic roofline ornamentation. These restorations will enhance the theater's iconic presence as it continues to offer arts and cultural performances to the community.

World Forestry Center, Portland \$1 million: Campus transformation project



The World Forestry Center is redeveloping its 5.5-acre campus with a new Mass Timber Experience Center, complementing the Discovery Museum. The center will feature hands-on exhibitions, speaker series, art installations, and cultural performances to engage the public on critical issues impacting the health of forests and communities.



Oregon Arts Commission Partner Report to the Oregon Cultural Trust February 27, 2025

2024 Highlights

- Career Opportunity Grant 53 Oregon artists were selected for funding during two rounds of this grant program, in partnership with the Ford Family Foundation's Visual Arts Program.
- **Operating Support Grant** (arts organizations with a budget over 150K) 171 organizations were awarded operating support grants from a range of \$3,000-\$30,000. The average award is \$7,711.
- **Small Operating Grant** (arts organizations with a budget under 150K) –110 small organizations were awarded operating grants with a grant award of \$2,363 each.
- Arts Learning Grant- 28 grants of \$10,000 each were awarded to support arts education across the state.
- Arts Build Communities- 52 grants of \$5,000 each were awarded to support community-based project grants across the state.
- **Individual Artist Fellowship-** Five Individual Artist Fellowships in the Performing Arts were awarded \$5,000 each including Antonio Melendez, Balamurali Balu, Barbara Cranford, Bora Yoon, Maximiliano Martinez
- **Percent for Art Program-** We managed 25 active Percent for Art projects by the end of 2024.
- Arts and Economic Prosperity Study and Eastern Oregon Tour- Oregon's arts and culture sector contributed \$829 million to Oregon's economy in fiscal year 2022, according to the latest Arts & Economic Prosperity study from Americans for the Arts. Released Oct. 12, the findings of Arts & Economic Prosperity 6 included data from 19 Oregon regions and communities. Oregon's study was supported in part by Travel Oregon. Randy Cohen, the vice president of research for Americans for the Arts, will visited nine Oregon communities in early November to share the results.
- **Poetry Out Loud-** Katie Lineburg, a senior from Hillsboro who attended St. Stephen's Academy, is Oregon's 2024 Poetry Out Loud champion. Lineburg received the top score at Saturday's Poetry Out Loud State Contest, held at Salem Public Library. She will now represented Oregon at the national Poetry Out Loud competition in Washington D.C.

Current Legislative Items

- The **Oregon Arts and Culture Caucus** kicked off the 2025 Legislative session on Wednesday, Feb. 12th, with an extremely successful an event featuring Oregon native and Grammy award-winner esperanza spalding. Almost 500 people attended and caucus members announced their 2025 priorities. The event is supported by Oregon Community Foundation, Creative West (formerly WESTAF), the Cultural Advocacy Coalition Foundation and Friends of Rob Nosse. It was organized in collaboration with the Cultural Advocacy Coalition of Oregon, the Oregon Arts Commission, Oregon Community Foundation and the Oregon Cultural Trust.
- The House Committee on Economic Development, Small Business and Trade met on February 17th to discuss **arts and culture legislative priorities**, including CACO's priorities. The Legislative Fiscal Office is currently drafting the amendment to the bill about the merger/semi-independent.
- We developed a communications plan and are conducting several **stakeholder sessions** to inform the arts and culture community about this potential merger and change to semi-independent status. Sessions include artists, arts and culture nonprofits, arts services, contractors, past Commissioners and others.
- The Cultural Advocacy Coalition of Oregon and Foundation are hosing **Arts and Culture Advocacy Day** on April 15th. The Arts Commission and Cultural Trust will hold a joint board meeting on April 14th, community engagement workshop of arts and culture leaders and a community reception in partnership with the Cultural Advocacy Coalition of Oregon that evening.

Current Grants

Career Opportunity Grant-

The Career Opportunity Grant Program supports Oregon arts practitioners across all disciplines and career stages in taking advantage of timely and concrete opportunities that can significantly enhance their artistic careers. This grant works in partnership with The Ford Family Foundation. We received around 107 applications in our recent February 12th deadline and will be confirming awards this month.

Sustaining Arts Grant

The purpose of the Sustaining Arts Program is to contribute to Oregon's arts organizations that offer ongoing, sustained, high-quality outreach programs and arts services or artistic programming in the community.

Beginning in 2025 / Fiscal Year 2026, The Oregon Arts Commission will offer operating support grants through the Sustaining Arts Program. This grant program includes two budget categories determined by an arts organization's annual operating expenses. All eligibility criteria remain the same as in previous years. The deadline for applications is Wednesday March 26, 2025. Group A - Annual operating expenses of less than \$150,000: (formerly named "Small Operating Support Grant") Award amounts range between \$1,000 - \$3,000. Requires documentation of annual operating expenses of <u>less than \$150,000</u>.

Group B - Annual operating expenses of more than \$150,000: (formerly named "Operating Support Grant") Award amounts range between \$5,000 - \$25,000. Requires documentation of annual operating expenses of <u>more than \$150,000</u>. This is now a non-competitive grant with a simplified application.

Arts Learning Grant

The purpose of the Arts Learning program is to support high-quality projects that: provide a responsive opportunity for learning in and through the arts to benefit K-12 students; foster exchange of knowledge between artists and educators; and impacts the achievement, skills and/or attitudes of learnings. Upcoming deadline: April 16, 2025.



Saturday, March 8th 1-4pm Historic Grand Theatre | 191 High St, Salem

You are invited to experience *Poetry Out Loud* in action! Join us in Salem to support the top high school students from across the state as they perform their selected poems for the opportunity to represent Oregon at the national competition in Washington, D. C.

Ellen Waterson, Oregon Poet Laureate, will be a special guest presenter. **Come see what it's all about!**

Poetry Out Loud is a contest open to all Oregon high school students. It is a free program encouraging young people to learn about great poems through memorization and competitive performance.

"I will forever be grateful for the chance to represent my home state of Oregon as well as my school and everyone who has made this adventure of a lifetime possible." Katie Lineburg 2024 Oregon State Champion

www.poetryoutloud.org



Poetry Out Loud is sponsored by the National Endowment for the Arts and the Poetry Foundation in cooperation with the Oregon Arts Commission and other state arts agencies.

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Tina Kotek, Governor

Parks and Recreation Department Oregon State Historic Preservation Office

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



State Historic Preservation Office Report

Legislative Session

Oregon Historic Theater Subgrant Program HB3190

The bill will reauthorize Special Assessment for commercial properties only. The first hearing had robust testimony. It is likely to have at least one amendment. A work session has not been scheduled yet.

Oregon Main Street Revitalization Grant SB5531

The lottery bond package includes \$10,000,000 for the Oregon Main Street Revitalization Grant.

Housing Bills HB2138, SB 464

These bills may have impacts on demolition review of National Register of Historic Places listed properties.

Three Federal Grants Wrap Up

Oregon Historic Theater Subgrant Program

This five-year project was selected for funding in the competitive Paul Bruhn Historic Revitalization Grants Program of the National Park Service. This program's purpose is to revitalize rural communities through historic preservation. OPRD was awarded \$665,000 and used the funds to rehabilitate eight theaters and list four on the National Register of Historic Places (now all eight are listed).

- Alger Theatre, Lakeview
- Cameo Theatre, Newberg
- Dallas Cinema, Dallas
- Egyptian Theatre, Coos Bay
- Granada Theatre, The Dalles
- Liberty Theatre, North Bend
- OK Theatre, Enterprise
- Rex Theater, Vale

The grants leveraged nearly \$600,000in matching funds and the projects will be accessed by an estimated 1,700, 000 people over the next five years!



Oregon African American MPD This five-year project helped create a tool for listing properties associated with Black^{Page 110} of h¹⁸

the National Register of Historic Places. The results were featured in the November 2024 FYI. A grant through the National Park Service Underrepresented Communities Grant Program provided \$30,000 and was matched with Oregon Cultural Trust partner funds. The project enhanced the agency's relationships with Oregon Black Pioneers and the University of Oregon Museum of Natural and Cultural History.

Bureau of Land Management Cooperative Services Agreement

This three-year project supported staffing of the compliance bureau of SHPO. The agreement was established during the critical time of low capacity during layoffs and high demand, in part due to the 2020 wildfires. The \$239,000 grant funds supported improved coordination, project review, and report digitization. Big thanks to the whole Finance team, Ian Johnson and Aspen Kemmerlin for coordination and management of this grant.

Grant Applications are Open

Oregon Heritage has opened applications for several grant programs. The website provides all of the basic information. <u>Information</u>

- Diamonds in the Rough Grant For historic building façade restoration.
- Oregon Historic Cemeteries Grant For projects in cemeteries listed with the Oregon Commission on Historic Cemeteries.
- Oregon Museum Grant <u>Information</u> Museums can apply for collections, interpretation and education, and tourism related projects.
- Preserving Oregon Grant <u>Information</u> To complete preservation work on historic properties and for archaeology projects.

Oregon Main Street Revitalization Grant Results

Since its creation by the Oregon Legislature in 2015, the Oregon Main Street Revitalization Grant has supported building projects to stimulate economic vitality in 59 communities. The local Main Street organizations, that administer the application and grant processes for the local property owners have brought from \$53,000 to \$900,000 to their communities through the life of the program, which awarded grants in 2017, 2019, 2022 and 2023. And over multiple grants, the City of Reedsport has improved 10 properties and has six more in progress.

The results demonstrate that the grant is meeting its purpose to acquire, rehabilitate or construct buildings to facilitate community revitalization. Even with several projects still in progress, the local benefits are remarkable.

- 92 buildings improved
- 101 housing units added
- At least 12 vacant buildings filled
- 5 intentional ADA improvements
- 7 structure re-enforcement projects
- 31 façade restoration projects

Learn more <u>here</u>.

Properties listed on the National Register of Historic Places

- https://www.oregon.gov/oprd/OH/pages/national-register.aspx#four
 - Juniper House, Portland, Multnomah County Originally constructed as a single-family residence in 1902, Juniper House co-founders John Trevitts, Doug Foland, and Jan Weyeneth converted the building into Oregon's first HIV/AIDS end-of-life care home in 1987. From May 1987 to September 1989, Juniper House filled a critical void in Oregon's healthcare system during a period marked by widespread stigma and systemic discrimination of people with HIV/AIDS. The care facility offered medical care as well as emotional support and a sense of peace, community, and normalcy for residents. Advocacy and education were also integral components of the mission of Juniper House; during its operation, press and local news outlets were invited to the house, leading to newspaper articles and documentary features on KGW-TV and Oregon Public Broadcasting that reached broad audiences in the late 1980s. Juniper House's influence was crucial in shaping public opinion and responses to HIV/AIDS in Oregon, and it inspired the establishment of several similar end-of-life care facilities around the state in the late 1980s and after.
- Burkes-Belluschi House in Portland, Multnomah County, listed in February 2025. <u>View the</u> nomination.
- **Dr. Edward and Anne McLean House** in West Linn, Clackamas County, listed in January 2025. The house is significant for its association with the Physicians' Association of Clackamas County (PACC), a very early Health Maintenance Organization (HMO) using the prepaid medical care foundation model. Dr. Edward McLean, working from his home office, collaborated with Dr. William O. Steele, and Dr. John ("Jack") G. P. Cleland to develop the organization between 1932 and 1938, in the depths of the Great Depression. Their mission was to provide health care coverage that was high quality, affordable, and designed to fit the needs of area residents—many of them millworkers and their families. The PACC was unique for its time, and it has since proved to be a national model for improving health care delivery. <u>View the nomination</u>.
- Lee-Janouch House in Medford, Jackson County, listed in January 2025. The Lee-Janouch House is significant as an excellent—and unusual—example of the National Park Service Rustic or Cascadian style in a private residential application. The house was constructed in 1934 by Isaac "Ike" Davidson, the building superintendent of Crater Lake National Park. <u>View the nomination</u>.
- Hughes Flying Boat (H-4 Hercules) in McMinnville, Yamhill County, relisted in November 2024. The Hughes Flying Boat (H-4 Hercules), often referred to as the "Spruce Goose," is nationally significant for its association with Howard R. Hughes, Jr., one of the most influential figures in American aviation history, and for the seaplane's service as a research and testing platform for innovative mechanically engineered systems that became standard in large aircraft after the WWII. As a one-of-a-kind prototype, the Hughes Flying Boat flew only one time, on November 2, 1947. It was then housed in Long Beach, California. It was initially listed in the National Register in 1980, but it was delisted in 1992 because it was disassembled and moved to McMinnville without prior NPS approval. In 2001, the aircraft was reassembled and today it is the centerpiece of the Evergreen Aviation & Space Museum. The Hughes Flying Boat is the largest seaplane, largest wooden aircraft, and largest propeller-driven plane ever built, and it is the only individually listed aircraft in Oregon. View the nomination

Work continues...

- Women's History Project RFP is open to complete survey and Multiple Property Submission for women's history.
- Guidelines update for archaeology, historic property survey and National Register of Historic Page 112 of 118

• Multiple Property Document Evaluation and Outreach project.

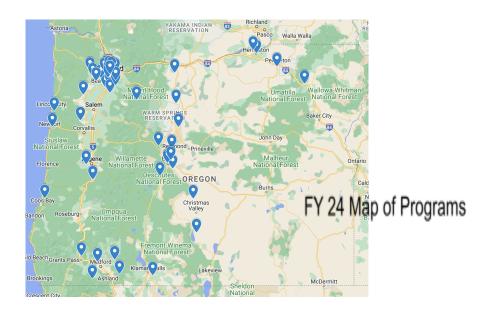
о. нт. Oregon Humanities

To the Oregon Cultural Trust Board of Directors,

In the past year, a lot was happening around the state for Oregon Humanities!

- Over 135 program events
- Over \$68,110.95 in program revenue
- More than 5,400 reported program attendees (data not available for all programs)
- Over \$150,000 in grants to 25 organizations around the state

We had a goal this past year to get more programs to the central and east side of the state and you can see we accomplished that with this year's map (below) of in-person program locations. We are aiming to get out to even more parts of the state in 2025! Below are all of our programs we made happen in our 2024 fiscal year. This does not represent the programs of or 25 grantee organizations, the reach of our magazine, online publications, and podcast.



FY 24 Oregon Humanities - Programs in Review November:

- Fall HIP (virtual)
- Conversation Projects Hosted:
 - Housing & Belonging
 - What is a Creative Priority
- Custom & Contracted work:
 - People's Nonprofit Accelerator Custom Training
- Hope & Climate Crisis
- Music as a Tool for Justice

- Conversations Across Difference college presentation
- Consider This on Getting Older and Staying Connected
- Spanish: Tertulia with Lorena de los pies ligeros
- Oregon Poet Laureate Appearances:
 - PAM CUT Tomorrow Theater Open House

December:

- Conversation Projects Hosted:
 - Understanding Urban/Rural Divides
- Custom & Contracted work:
 - Conversations Across Difference college presentation

January:

• Winter HIP Course (virtual)

February:

- Advisory Committee First Meeting
- Leading Reflective Conversations Training (virtual)
- Conversation Projects Hosted:
 - Housing & Belonging
 - Listening to Children and Elders
 - Hope and Climate Crisis
- Oregon Poet Laureate Appearances
 - 2024 Whiteley Distinguished Lecture
 - LaGrande: Reading and Visit with Anis Mojgani

March:

- Consider This with Father Greg Boyle
- Leading Reflective Conversations Training (in-Portland)
- Conversation Projects Hosted:
 - Music and a Tool for JusticeWorking on our Whiteness

- Unpacking Accountability
- Housing & Belonging
- Everyone Can Be a Leader

- Custom & Contracted work:
 - Delaware Humanities training
 - Environmental Studies class guest presentation
 - Conversation on Connecting Across Differences
 - 2024 Abrazando Comunidades Washington County
- Oregon Poet Laureate Appearances
 - Seaside Public Library appearance
 - Anis Mojgani at UUFCO

April:

- Spring HIP (in-person)
- Consider This with Eli Salsow

- Poetry Phone Line
- So Much Together with Dan Currin
- Conversation Projects Hosted:
 - Housing & BelongingWhat Does Democracy
 - What Does Democracy Require?
- Custom & Contracted work:
 - Clemente Course in the Humanities Custom Training
 - Colorado Humanities Training
 - 2024 Abrazando Comunidades Willamette Valley
 - 2024 Abrazando Comunidades Eastern Oregon
- Oregon Poet Laureate Appearances
 - Cottage Grove Oregon Poet Laureate, Anis Mojgani
 - Street Roots appearance
 - 10th Grade Poet Laureate Visit
- Spanish: Tertulia: 100 dias con la Tata
- Beyond 250 Spring Training Maupin

May:

- Second Advisory Committee Meeting
- So Much Together with Taylor Stewart
- Consider This: Humans, Land, and Animals in Pendleton
- So Much Together with Randal Wyatt
- Conversation Projects Hosted:
 - Everyone Can Be a Leader
 - Can We Get Along

- Relationships for Resilience
- Art as Activism
- Leading Reflective Conversations Training in Klamath Falls
- Custom & Contracted work:
 - Indiana Humanities Training
 - University of Portland Conversation
 - 2024 JCCLTRG Training
 - Bridge Meadows

June:

- So Much Together: con Asociación de la Comunidad Latina
- So Much Together with Bobby Bermea
- Conversation Projects Hosted:
 - (Spanish) Cultura y Preservación del Patrimonio
 - Does Nature Have a Purpose?
- Bike Summer: Civic Love Ride

July:

• Conversation Projects Hosted:

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- Can We Get Along?
- Everyone Can Be A Leader

- Does Nature Have a Purpose?
- Unpacking Accountability
- Softening Sharp Teeth (practice)
- So Much Together with Corey Murphy in Klamath Falls
- Custom & Contracted work:
 - 2024 Abrazando Comunidades Central Oregon
- Bike Summer: Spoke'n Words with Write Around Portland
- Leading Reflective Conversations Training (Virtual)
- Spanish:
 - Interpretando Nuestro Territorio Hike
 - Tertulia: Un abrazo de tres minutos

August:

- Conversation Projects Hosted:
 - Listening to Children and Elders
- Leading Reflective Conversations Training (Portland)
- Custom & Contracted work:
 - University of Portland Anchor Class training
- Oregon Poet Laureate Appearances:
 - Rendezvous Gala poetry reading

September:

- Beyond 250 Training in Grants Pass
- Beyond 250 Training in Newport
- Conversation Projects Hosted:
 - Cultura y Preservación del Patrimonio
- Consider This with Dahlia Lithwick
- Custom & Contracted work:
 - First Year Experience Leaders Training with University of Portland
 - New York Humanities Training
 - 2024 Abrazando Comunidades Oregon Coast
 - 2024 Providence Clemente Veterans Initiative Training
 - Virginia Garcia Custom Training
- Spanish: Tertulia: película sorpresa
- Fall HIP (In-Person)
- Oregon Poet Laureate Appearances:
 - Interview for "The Creative Way"
 - IN A LANDSCAPE: Fort Rock State Natural Area
 - 11th Oregon Poet Laureate Celebration
 - Cottage Grove

October:

• Conversation Project Leader Virtual Retreat

- Conversation Projects Hosted:
 - Unpacking Accountability
 - Talking about Dying
- Spanish:
 - Tertulia: Mis Otro Yo y Cocodrilo
 - Conexión con Nuestro Territorio Hike
- Oregon Poet Laureate Appearances:
 - Cultural Trust Board Meeting Presentation
 - Business Oregon Staff Meeting Presentation
 - OPA Annual Conference 2024
 - Alice & Friends Birthday Bash
 - Bend Council Meeting Reading
 - An Evening with Ellen Waterston & Joe Wilkins
 - Caldera Hearth Festival
 - OCF Biannual Council Retreat
 - Bend Workshop for Students

Oregon Humanities continues to design strong programs, engage new audiences, support more grantees, and work to improve internal tracking systems. Events are regularly added to our <u>calendar</u>. 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. 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.

Warmly, Jennifer Alkezweeny Program Director Oregon Humanities jennifer@oregonhumanities.org

- Cultura y Preservación del Patrimonio
- Can We Get Along
- Tertulia: Una Isla en el Continente
- Housing & Belonging