

**FY23 Budget Performance Review
35000 Oklahoma Historical Society**

Lead Administrator: Trait Thompson

Lead Financial Officer: Terry Howard

Agency Mission

The mission of the Oklahoma Historical Society is to collect, preserve, and share the history and culture of the state of Oklahoma and it's people.

Division and Program Descriptions

Note: Please define any acronyms used in program descriptions.

01 Administration

Administration - Encompasses the following divisions: Finance, Purchasing, Public Information, IT, Development, Human Resources and Mail/Supply

10 Museums & Sites

Museums & Sites - Encompasses the following major areas: Sites, Museums, Historic Homes, the History Center and Will Rogers Memorial Museum.

20 Preservation

Preservation - Operation of the State Historic Preservation Office.

40 Research

Research - Operation of the Research Division at the History Center.

88 IT

IT - All agency IT purchases/leases and services provided by OMES.

FY'22 Budgeted Department Funding By Source

| Dept. # | Department Name | Appropriations | Federal | Revolving | Local ¹ | Other ² | Total |
|--------------|-----------------|---------------------|--------------------|--------------------|--------------------|--------------------|---------------------|
| 01 | Administration | \$936,119 | | \$146,459 | | | \$1,082,578 |
| 10 | Museums & Sites | \$9,783,007 | | \$5,619,318 | | | \$15,402,325 |
| 20 | Preservation | \$323,257 | \$1,048,164 | \$0 | | | \$1,371,421 |
| 40 | Research | \$1,410,903 | | \$600,326 | | | \$2,011,229 |
| 88 | IT | \$739,037 | \$20,044 | \$43,372 | | | \$802,453 |
| Total | | \$13,192,324 | \$1,068,208 | \$6,409,475 | \$0 | \$0 | \$20,670,007 |

1. Please describe source of Local funding not included in other categories:

2. Please describe source(s) and % of total of "Other" funding if applicable for each department:

FY'21 Carryover by Funding Source

| Class Fund # | Carryover Class Fund Name | Appropriations | Federal | Revolving | Local ¹ | Other ² | Total |
|--------------|---------------------------|----------------|---------|-----------|--------------------|--------------------|-------|
| | | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |

1. Please describe source of Local funding not included in other categories:

2. Please describe source(s) and % of total of "Other" funding if applicable:

What changes did the agency make between FY'21 and FY'22?

1.) Are there any services no longer provided because of budget cuts?

Yes, services have been lost in all divisions due to the 48% budget cuts over the past ten years. In addition to reduced hours of operation in the library and at museums and historic sites scattered across the state, the elimination of staff positions across the board has been a setback in terms of critical planning, staff development, and projects that generate revenue and press coverage.

2.) What services are provided at a higher cost to the user?

There have not been any increases in fee.

3.) What services are still provided but with a slower response rate?

Research assistance by mail and email; digitization and posting on our website of archival records and historic newspapers; planning and fabrication of new museum exhibits

4.) Did the agency provide any pay raises that were not legislatively/statutorily required?

The only pay raises granted were due to promotions, career progressions, and market adjustments as authorized by statute.

FY'23 Requested Funding By Department and Source

| Dept. # | Department Name | Appropriations | Federal | Revolving | Other ¹ | Total | % Change |
|--------------|-----------------|---------------------|--------------------|--------------------|--------------------|---------------------|---------------|
| 01 | Administration | \$1,037,119 | \$0 | \$146,459 | \$0 | \$1,183,578 | 9.33% |
| 10 | Museums & Sites | \$13,609,727 | \$0 | \$5,619,318 | \$0 | \$19,229,045 | 24.85% |
| 20 | Preservation | \$323,257 | \$1,048,164 | \$0 | \$0 | \$1,371,421 | 0.00% |
| 40 | Research | \$1,979,303 | \$0 | \$600,326 | \$0 | \$2,579,629 | 28.26% |
| 88 | IT | \$799,037 | \$20,044 | \$43,372 | \$0 | \$862,453 | 7.48% |
| Total | | \$17,748,444 | \$1,068,208 | \$6,409,475 | \$0 | \$25,226,127 | 22.04% |

1. Please describe source(s) and % of total of "Other" funding for each department:

FY'23 Top Five Operational Appropriation Funding Requests

| Request by Priority | Request Description | Appropriation Request Amount (\$) |
|---|--|-----------------------------------|
| Request 1: | \$46M bond issue/special cash for deferred maintenance | \$46,000,000 |
| Request 2: | Debt service payments for bond issue | \$2,800,000 |
| Request 3: | Restore personnel funds lost due to budget cuts | \$1,250,120 |
| Request 4: | Ft. Gibson and Ft. Towson 200th anniversary activities | \$380,000 |
| Request 5: | Connect remote sites and museums to OKC data center | \$60,000 |
| Request 6: | Operating funds for Ft. Supply | \$66,000 |
| Top six Request Subtotal: | | \$50,556,120 |
| Total Increase above FY-22 Budget (including all requests) | | \$ 50,556,120 |
| Difference between Top Five requests and total requests: | | \$0 |

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Does the agency have any costs associated with the Pathfinder retirement system and federal employees?

The agency will have an approximate expense of \$18,200 for FY23.

How would the agency be affected by receiving the same appropriation for FY '23 as was received in FY '22? (Flat/ 0% change)

Service will be provided at approximately same level. Inability to replace staff reduced by budget cuts in the last few years.

How would the agency handle a 2% appropriation reduction in FY '23?

We would have to close or transfer 3 historic sites or museums affecting approximately 5 FTEs.

Is the agency seeking any fee increases for FY '23?

| | Fee Increase Request (\$) | Statutory change required? (Yes/No) |
|--------------------|---------------------------|-------------------------------------|
| Increase 1 None | | |

What are the agency's top 2-3 capital or technology (one-time) requests, if applicable?

| Description of request in order of priority | Appropriated Amount (\$) | Submitted to LRCPC? (Yes/No) |
|---|--------------------------|------------------------------|
| Priority 1 | | |

Federal Funds

| CFDA | Federal Program Name | Agency Dept. # | FY 22 budgeted | FY 21 | FY 20 | FY 19 | FY 18 |
|--------|------------------------------------|----------------|----------------|---------|---------|---------|---------|
| 15.904 | Historic Preservation Grant In Aid | 20 | 1,068,208 | 799,744 | 742,686 | 863,344 | 781,834 |

Federal Government Impact

- 1.) How much federal money received by the agency is tied to a mandate by the Federal Government?**
100%
- 2.) Are any of those funds inadequate to pay for the federal mandate?**
No
- 3.) What would the consequences be of ending all of the federal funded programs for your agency?**
The result would be the elimination for the Office of Historic Preservation, which is the contractual partner of the National Park Service to evaluate the impact of federal undertakings on historical resources. The environmental clearance for some oil and gas well sites, highway projects, housing projects, national bank construction, tax credits, and federal grants would fall to the Historic Advisory Council in Washington, D.C. and result in lengthy delays in utilizing federal funds or requiring federal permits.
- 4.) How will your agency be affected by federal budget cuts in the coming fiscal year?**
Federal budget cuts could reduce preservation grants to local cities, reduce the number of historic surveys that speed the review process, and reduce the staff, which would slow all services delivered by the SHPO staff.
- 5.) Has the agency requested any additional federal earmarks or increases?**
The OHS has not requested any additional federal earmarks or increases.

FY'22 Budgeted FTE

| Division # | Division Name | Supervisors | Classified | Unclassified | \$0 - \$35 K | \$35 K - \$70 K | \$70 K - \$\$\$ |
|--------------|-----------------|-------------|------------|--------------|--------------|-----------------|-----------------|
| 1 | Administration | 4 | 8 | 3 | 3 | 5 | 3 |
| 10 | Museums & Sites | 9 | 65 | 11 | 19 | 54 | 3 |
| 20 | Preservation | 1 | 8 | 1 | 3 | 5 | 1 |
| 40 | Research | 4 | 18 | 3 | 12 | 7 | 2 |
| Total | | 18 | 99 | 18 | 37 | 71 | 9 |

FTE History

| Division # | Division Name | 2022 Budgeted | 2021 | 2020 | 2018 | 2013 |
|--------------|-----------------|---------------|--------------|--------------|--------------|--------------|
| 1 | Administration | 12.0 | 12.0 | 12.0 | 11.0 | 13.0 |
| 10 | Museums & Sites | 81.0 | 79.0 | 79.0 | 80.0 | 84.0 |
| 20 | Preservation | 10.0 | 10.0 | 9.0 | 10.0 | 10.0 |
| 40 | Research | 21.0 | 21.0 | 21.0 | 23.0 | 27.0 |
| Total | | 124.0 | 122.0 | 121.0 | 124.0 | 134.0 |

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Performance Measure Review

| Program Name | FY 21 | FY 20 | FY 19 | FY 18 | FY 17 |
|--|-----------|-----------|-----------|-----------|-----------|
| Administration | | | | | |
| Institutional partnerships | 221 | 176 | 178 | 132 | 130 |
| Professional development of staff (hours) | 751 | 805 | 865 | 812 | 852 |
| Website visits | 9,118,632 | 7,181,941 | 6,957,258 | 6,516,168 | 6,419,948 |
| Museums & Sites | | | | | |
| Artifacts received | 4,557 | 1,508 | 1,698 | 1,190 | 1,177 |
| Museum visitors | 130,130 | 282,609 | 336,872 | 375,628 | 401,100 |
| History Day student and teacher participants | 6,597 | 7,530 | 7,196 | 6,365 | 6,578 |
| Major exhibits opened | 12 | 12 | 13 | 12 | 12 |
| Community events hosted at OHS facilities | 533 | 3,610 | 1,686 | 440 | 435 |
| Volunteer hours | 32,158 | 42,581 | 45,112 | 44,518 | 40,437 |
| State funds spent on repair and maintenance | 1,023,529 | 1,663,084 | 1,094,342 | 1,086,302 | 1,196,519 |
| Preservation | | | | | |
| Additions to Oklahoma Landmarks Inventory | 2,500 | 4,996 | 2,595 | 4,512 | 4,462 |
| Resources nominated to the National Register | 70 | 413 | 213 | 48 | 46 |
| Local preservation programs | 13 | 32 | 47 | 13 | 13 |
| Federal projects reviewed for section 106 | 3,082 | 5,219 | 5,084 | 3,301 | 3,259 |
| Consultations made | 3,752 | 4,158 | 3,716 | 6,213 | 5,998 |
| Research | | | | | |
| Photographs received | 232,256 | 258,621 | 193,584 | 215,982 | 35,000 |
| Newspaper titles received | 263 | 263 | 265 | 260 | 223 |
| Research patrons | 50,136 | 42,580 | 45,117 | 46,081 | 42,095 |
| Publications released | 90 | 90 | 90 | 90 | 90 |
| Pages of collections digitized and placed online | 1,500,000 | 235,102 | 365,891 | 258,974 | 294,705 |
| Research requests processed | 20,992 | 11,305 | 11,700 | 7,145 | 7,871 |

Revolving Funds (200 Series Funds)

| Please provide fund number, fund name, description, and revenue source | FY'19-21 Avg. Revenues | FY'19-21 Avg. Expenditures | June '21 Balance |
|--|------------------------|----------------------------|------------------|
| Fund number: Fund name | | | |
| 20000 - OHS Main Revolving Fund | \$3,142,521 | \$2,992,979 | \$153,405 |
| 29000 - Will Rogers Museum Revolving | \$143,878 | \$181,242 | \$15,564 |
| 22500 - Sales/Use Tax Revolving | \$1,535,549 | \$1,774,501 | \$1,105,971 |
| 24100- Tulsa Race Massacre | \$1,500,000 | \$16,082 | \$1,466,983 |