

Oregon Heritage Vitality Study

November 2024



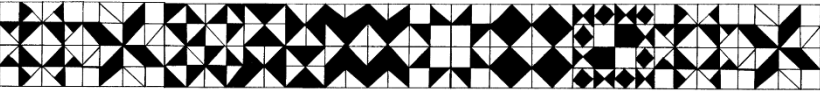
School of Planning, Public
Policy and Management
Institute for Policy
Research and Engagement



**OREGON
HERITAGE**
oregonheritage.org



About the Oregon Heritage Commission



The Oregon Heritage Commission is a group of leaders from across the state that works collaboratively to champion resources, recognition, and funding for preserving and interpreting Oregon's past. Founded in 1995 by the Legislature, the Heritage Commission is comprised of nine gubernatorial appointments and nine ex-officio members. The Commission is designated in [ORS 358.570-595](#) as the primary agency for coordination of heritage activities in Oregon.

The Oregon Heritage Commission is charged with preparing the Oregon Heritage Plan. This statewide plan identifies opportunities for the heritage sector to strengthen heritage preservation efforts in the state and lays the foundation for the Commission's priorities.

At the time of this report, the following members make up the Oregon Heritage Commission:

Appointed

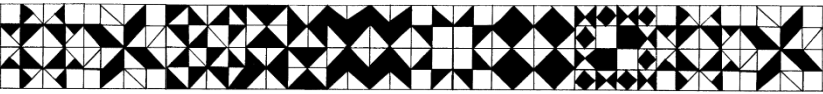
Rosemary Johnson, Chair
Kerry Savage, Vice Chair
Maureen Flanagan Battistella
Libby Provost
Jaime Marroquín
Randall Melton
Katee Withee

Ex-Officio

Chrissy Curran, State Historic Preservation Office
Ross Fuqua, State Library of Oregon
Amit Kobrowski, Department of Education
Larry Landis, Higher Education Coordination Committee
Mary McRobinson, State Archives
Michelle Woodard, Travel Oregon
Kerry Tymchuk, Oregon Historical Society



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Prepared by

Community Planning Workshop
Institute for Policy Research and Engagement
1209 University of Oregon
Eugene, OR 97403

Prepared for

Oregon Parks & Recreation Department
Oregon Heritage – Oregon Heritage
Commission

University of Oregon Institute for Policy Research & Engagement

Aniko Drlik-Muehleck, Project Director
Amanda Ferguson, Project Advisor

Student Research Team

Caroline Alkire
Lauren Van Vliet
Lee Tachoir

Oregon Heritage Advisors

Katie Henry, Oregon Heritage Commission Coordinator
Kuri Gill, Grants & Outreach Manager

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About the Institute for Policy Research & Engagement



**School of Planning, Public
Policy and Management
Institute for Policy
Research and Engagement**

The Institute for Policy Research & Engagement (IPRE) is a research center affiliated with the School of Planning, Public Policy, and Management at the University of Oregon. It is an interdisciplinary organization that assists Oregon communities by providing planning and technical assistance to help solve local issues and improve the quality of life for Oregon residents. The role of IPRE is to link the skills, expertise, and innovation of higher education with the transportation, economic development, and environmental needs of communities and regions in the State of Oregon, thereby providing service to Oregon and learning opportunities to the students involved.

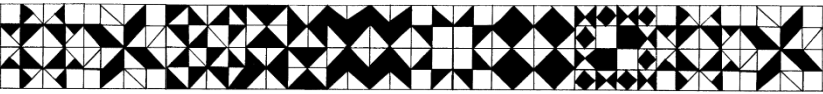
About the Economic Development Administration University Center



The University of Oregon Economic Development Administration University Center (UO EDA-UC) is a partnership between the Institute for Policy Research and Engagement, the UO Department of Economics, the Oregon Small Business Development Center Network, and the UO faculty. The UO EDA-UC provides technical assistance to organizations throughout Oregon, with a focus on rural economic development. The UO EDA-UC seeks to align local strategies to community needs, specifically with regards to building an understanding of the benefits of sustainable practices and providing technical training to capitalize on economic opportunities related to those practices. The UO EDA-UC is partially funded through a grant from the U.S. Department of Commerce, Economic Development Administration.



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Project Advisory Team

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Katie Henry, Oregon Heritage

Kuri Gill, Oregon Heritage

Maureen Battistella, Oregon Heritage Commission

Nicole Possert, Restore Oregon

Peter Kukla, Oregon Museums Association

Sue Hildick, Cultural Advocacy Coalition of Oregon

Tara Cole, Oregon Historical Society

Workshop Attendees

Cascade Locks, hosted at the Gorge Beer Company

Oregon Folklife Network

Portland Area Theatre Alliance

Columbia River Gorge National Scenic Area

Cascade Locks Historical Museum

City of Hood River

Mainstreet Cascade Locks

Coos Bay, hosted at the Coos History Museum

Coos History Museum

Oregon Museums Association

City of Coos Bay Parks & Adopt A Park Pilot Program

City of North Bend

Coos Bay North Bend Charleston Visitor and Convent

Marshfield Pioneer Cemetery

City of Coos Bay

Coos Art Museum



Marshfield Sun Association
Marshfield Sun Printing Museum

Forest Grove, hosted at the Forest Grove Library

State Library
Independent/contractor
Tamástslikt Cultural Institute
Relicura, LLC
Hillsboro Historical Society
Oregon Historical Society
Oregon Heritage Commission
Historical Research Association
Old Aurora Colony Museum
Keizer Heritage Foundation
Oregon Parks and Recreation Department
Tillamook Co. Pioneer Museum
Yamhill City Historical Society

La Grande, hosted at the Cook Memorial Library

Baker City Downtown
Friends of Hot Lake/EOU History dept.
Baker County Assessor
Eastern Oregon Visitors Association
Hoyo
Nez Perce Wallowa Homeland
Liberty Theatre Foundation
LG Historical District
La Grande Main Street Downtown
Ducote Consulting

Medford, hosted at the Rogue Valley Genealogical Society Library

Phoenix Historical Society
Talent Historical Society
Guardians of the EP Museum
Oregon Historical Society
Applegate Valley Historical Society
Walk Ashland
Independent – Self
Crater Rock Museum
Roxy Ann Gem and Mineral Society
State of Oregon
Rogue Valley Genealogical Society



Virtual Workshop, hosted by the research team through Zoom

Bureau of Land Management

Oregon Frontier Chamber of Commerce

Friends of Vista House

Graduate student in Arts Administration, Education, and Policy

Friends of the Oregon Caves and Chateau

Britt Music and Arts Festival

Linn County

City of Newberg

Philip Foster Farm Historic Site

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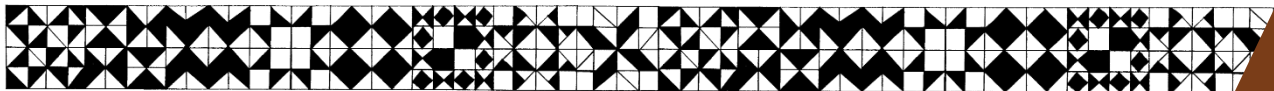
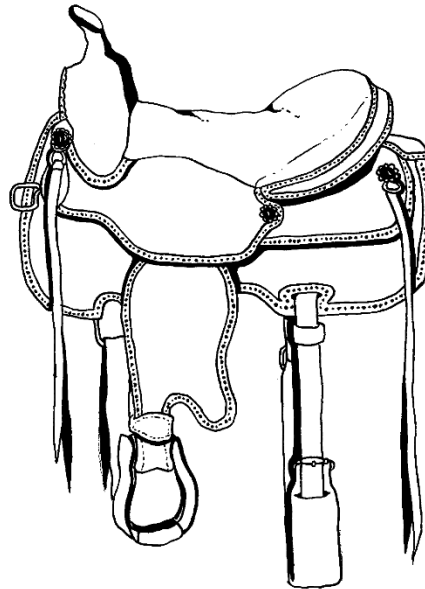
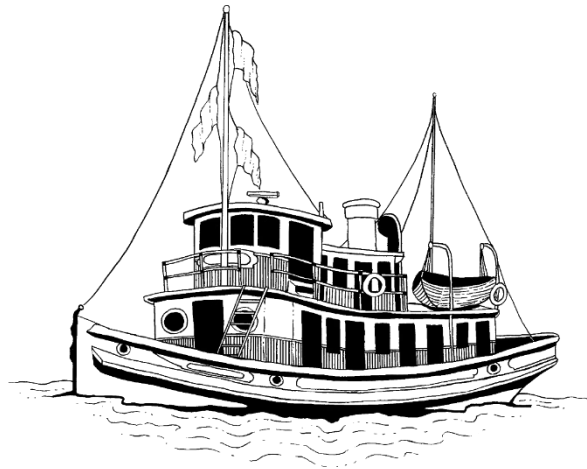
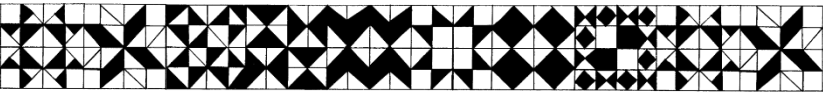


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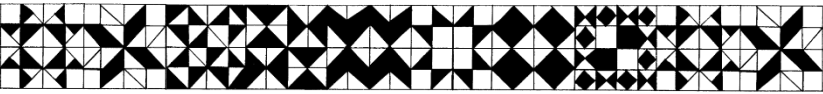
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Executive Summary



In late 2023, the Oregon Heritage Commission partnered with the University of Oregon’s Institute for Policy Research and Engagement (IPRE) to examine the operational vitality of Oregon’s heritage organizations. The 2024 Vitality Study is an adaptation of its predecessor, “Oregon Heritage Vitality 2010: The Challenge of the Past for Oregonians Today and Tomorrow,” and documents the contemporary issues facing Oregon heritage organizations.

The Oregon Heritage Commission hopes to conduct research of this kind periodically to create a long-term understanding of the needs of the heritage sector in response to emerging issues and trends in the field. This and future reports will capture a snapshot of what organizations make up the heritage sector, explore the issues affecting these organizations, and offer recommendations to increase the vitality of the heritage sector.

Oregon Heritage Today

What do we know about the organizations working in Oregon’s heritage sector today? To get a better understanding of the makeup, concerns, and priorities of heritage organizations, we asked vitality survey respondents to provide detailed information about the organizations they represent.

Organizational Structure

Organization Governance (n=239)
Nonprofit 47%
Local government 16%
Private for-profit business 12%
State government 5%

Organization Type (n=264)
Museums 40%
Place-based 16%
Third-Party Support 16%
Archives 13%





Concerns at a Glance

Top Four Most Pressing Current Issues (n=232)

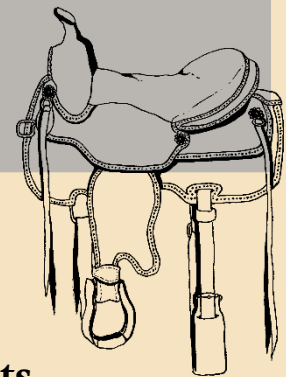
- 44% Keeping heritage and cultural organization viable and relevant
- 41% Balancing best practices with lack of capacity
- 38% Maintaining or restoring historic structures resources in light of rising costs
- 34% Volunteer or staff burnout

Top Resources in Peril (n=227)

- 41% Historic photos, film, documents, rare book collections
- 33% Indigenous languages
- 30% Smaller homes and very desirable residential neighborhoods(the tear down and replace issue)
- 30% Traditional cultural sites

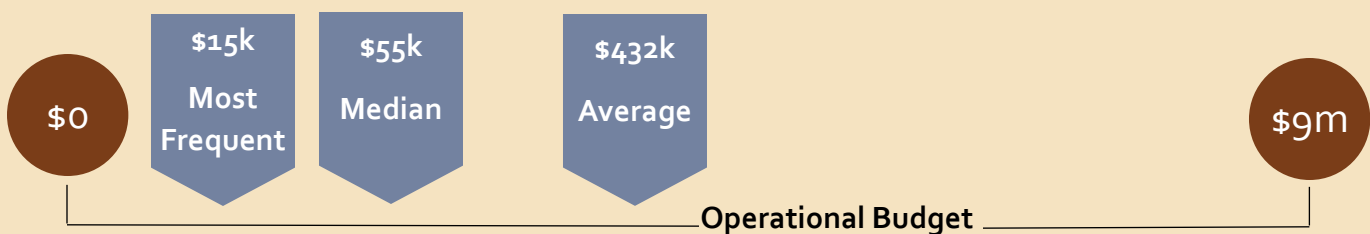
Top Five Emerging Issues (n=228)

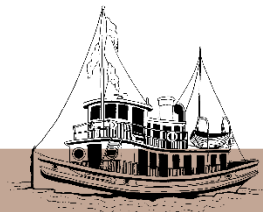
- 58% Facilities issues rising expense of land /building /maintenance
- 41% Unstable volunteer count impacting ability to maintain operations
- 31% Tensions over what stories identities get represented by whom and how they're represented
- 29% Decisions related to the role of heritage organizations and responding to social economic and community issues
- 29% Fewer emerging professionals interested in heritage related professions



Oregon Heritage Organizational Budgets

Range and Details in 2024 (n=146)





Current Issues

Issue 1: Heritage Resources are at Risk

Perceived competing needs, fragile organizations, and disasters are risks for heritage resources like historic properties, historic photos and documents, traditional cultural sites, and Indigenous languages. Difficulties supporting, funding, and promoting the value of these resources make it difficult to garner support to protect them.

Issue 2: Value of Heritage is Under-Recognized

Heritage organizations have difficulty promoting their value and role in the community as an economic and social benefit.

Issue 3: Connecting Organizations to Resources

A multitude of resources are available to assist organizations with training, funding, and technical support. However, many heritage organizations are unaware of these resources or lack the capacity to access them.

Issue 4: Shifting Collections and Interpretive Themes

Many experiences have been excluded or underrepresented in the collection and curation of Oregon's history and heritage resources. Additionally, each passing year brings more history to collect and interpret. Incorporating this full history in the work of heritage organizations takes learning, planning, communication, collaboration, and support. The heritage sector is struggling to navigate shifting narratives and the competitive funding that comes along with it.

Issue 5: Continued Need for Well-Trained and Supported People

Heritage organizations face significant challenges in recruiting new staff and volunteers – including burnout, lack of available training, and barriers for emerging professionals. These issues hinder organizations' ability to sustain a dedicated and well-supported workforce essential for their operations.

Issue 6: Coordination and Collaboration within the Heritage Sector

Heritage organizations report the desire to connect with each other and build a stronger network. While this work is happening, it could be enhanced and developed to be more inclusive and provide more concrete results.

Issue 7: Funding for Operational and Maintenance Needs

Heritage organizations report that facilities maintenance and staffing needs are big issues for the next ten years. Costs continue to increase, and funding sources often limit eligible projects based on funders' priorities and long-standing preferences to support specific initiatives over ongoing operations. This instability in funding and capacity impacts succession efforts and resilience.

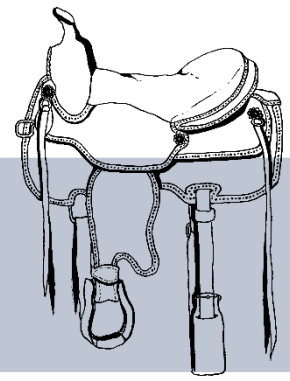
Issue 8: Making the Most of Digital Opportunities

Heritage organizations report a desire to use digital tools to preserve collections and increase access to collections and interpretation online. However, organizations face barriers including inadequate infrastructure, limited access to software and hardware, and lack of awareness and training for existing systems.

Issue 9: Connecting to Communities

Heritage organizations aim to broaden community engagement, and recognize its importance in gaining support, demonstrating relevance, and enhancing organizational capacity. Organizations particularly focus on youth engagement, a term broadly defined to include individuals from school-age children to those in their middle-ages (anywhere from 30 to 50, depending on the age group of the organization's staff and their comfort levels with various younger age groups). More work needs to be done engaging youth, other generations, and diverse communities.





The Path Forward

1. Taskforce/Workgroup

- 1.1. **Collective Case-Making:** Discuss and determine the best ways for the sector to talk about the value of heritage.
- 1.2. **Internal Coordination around Service-Provision:** Explore how to collectively align work across the sector and create more regional support.
- 1.3. **Funding:** Explore mechanisms to increase the accessibility of grants, both those controlled by the State and those controlled by other funders. Discuss steps to ease the burden on organizations.

2. Communicating About Resources

- 2.1. Adapt existing resources to promote accessibility and create more universality within their content to allow for higher usage across the sector.
- 2.2. Explore the development of a centralized hub of information or other creative and scalable solutions that streamline access to resources.
- 2.3. Discuss new ways that networking and peer-to-peer technical assistance can enhance heritage organizations.

3. Promoting the Value of Heritage

- 3.1. Develop a statewide marketing campaign to promote the existence and value of heritage resources and organizations.
- 3.2. Fund the State Library of Oregon to expand and promote Northwest Digital Heritage.
- 3.3. Aggregate existing heritage tourism studies to understand the economic value of heritage in that industry and identify any missing information.

4. Increasing Funding Options

- 4.1. Identify new funding streams to expand grant and funding options for organizations.
- 4.2. Identify or develop funding assistance for building maintenance and repair.
- 4.3. Increase grant application assistance.

5. Fostering Community Connections

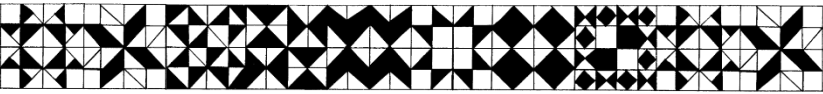
- 5.1. Research local public perceptions of historic places and preservation to allow Oregonians to share heritage interests and overall preferences for getting involved.
- 5.2. Focus on connecting with youth through educational opportunities.
- 5.3. Facilitate conversations about changing collections and interpretive themes to engage existing and new participants.

6. Addressing Facilities and Operations Needs

- 6.1. Increase existing and source new and different forms of financial assistance.
- 6.2. Facilitate resource sharing across organizations.



1. Introduction



In late 2023, the Oregon Heritage Commission partnered with the University of Oregon’s Institute for Policy Research and Engagement (IPRE) to examine the operational vitality of Oregon’s heritage organizations. The 2024 Vitality Study is an adaptation of its predecessor, “Oregon Heritage Vitality 2010: The Challenge of the Past for Oregonians Today and Tomorrow,” and documents the contemporary issues facing Oregon heritage organizations.

The Oregon Heritage Commission aims to conduct research of this kind periodically to create a long-term understanding of the needs of the heritage sector in response to emerging issues and trends in the field. This and future reports will capture a snapshot of what organizations make up the heritage sector, explore the issues affecting these organizations, and offer recommendations to increase the vitality of the heritage sector.

In This Report

Chapter 1 (this chapter) provides context and a general framework for the 2024 Vitality Study, including a recap of the 2010 Vitality Study and the methods used for this study.

Chapter 2 summarizes some of the major trends in the heritage sector since 2010 and provides a snapshot of current heritage organizations’ operational factors and high-level concerns.

Chapter 3 examines the findings from the 2024 Vitality Study, discussing nine primary issues facing Oregon heritage organizations today.

Chapter 4 suggests recommendations to address the issues identified by the 2024 Vitality Study.

Appendix A: 2010 Issues Status gives an update on the issues detailed in the 2010 Vitality Study to provide context for how issues have shifted over the past decade and a half.

Appendix B: Survey Results summarizes heritage organizations’ responses to the 2024 Vitality Study survey.

Appendix C: Interview Summary and Notes compiles findings from interviews conducted in 2024 with 10 heritage sector representatives.

Appendix D: Workshop Summaries and Notes compiles findings from the six workshops conducted in 2024 with heritage organizations to discuss and brainstorm solutions to issues in the heritage sector.



Precedent for the Oregon Heritage Vitality Study

In the late-2000s, the United States was experiencing an economic recession that disrupted many parts of the economy, including the cultural and heritage sectors. In Oregon, the recession coincided with the state's sesquicentennial, a celebration that held the expectation of increased engagement with and investment in heritage organizations. While attendance at historic sites did increase during this time, public funding decreased for many of them including several large institutions in the state. In response to the trend of public disinvestment and in order to understand the scope of organizational hardship, the Commission sponsored a study to explore the financial and operational vitality of heritage organizations, which sparked several policies and programmatic efforts to address the highlighted concerns.

In 2010, the researchers grouped their findings into the following eight issues and offered the following four recommendations in response:

2010 Issues

1. **Funding scarcity:** unstable and inadequate government and private funding
2. **Inter-organizational collaborations:** little meaningful coordination and collaboration among heritage organizations and their communities
3. **Quantifying value:** the inability to articulate the economic value of Oregon heritage
4. **Leaving heritage education behind:** changing educational requirements that have reduced the time and respect given to history instruction in primary, secondary, and higher education
5. **Lack of skilled workers:** shortage of people with the skills and knowledge to address issues of preservation, fundraising, leadership, and technology
6. **Declining connection to Oregon's history:** changing demographics and expectations creating different relationships with history
7. **Limited modern communication strategies:** limited use of 21st-century communications and advocacy strategies by heritage organizations
8. **Relationship with technology:** uneven development and use of technology by heritage organizations

Appendix A offers details about how each of these issues has evolved since 2010.

2010 Recommendations

1. **Task Force:** Request that the 2011 Legislature appoint an interim task force to examine state and county financial support for Oregon heritage organizations, and to develop solutions to the challenges.
2. **Valuing Heritage:** Determine the economic and cultural value of heritage to Oregon, including its direct and secondary impacts.
3. **Communicating Value:** Strategically communicate consistent information about the value and importance of heritage to the economy and daily lives of Oregonians.
4. **Supporting Organizations:** Increase the capacity of heritage organizations and businesses to collaboratively expand their leadership, development, preservation, community building, communications, educational offerings and technology.



Snapshot of Progress on 2010 Recommendations

1. Task Force

In 2012, the interim task force published the "[Report of the Legislative Task Force on Oregon Heritage Vitality](#)," bringing their findings before the 76th Oregon Legislative Assembly. They called for an increase in public and private funding to safeguard Oregon's "remarkable history and heritage."

2. Valuing Heritage

This directive resulted in a series of studies and documents including, [The Value of Oregon Heritage Organizations' Volunteers](#), [The Value of Heritage in Community Disaster Resilience](#), [The Impact of Oregon's Main Streets](#), and the 2022 report by ECONorthwest "[Economic Impacts and Value of Oregon's Heritage Organizations and Events](#)."¹ This last report details how Oregon Heritage organizations value, benefit, and contribute to the state and local economies.

3. Communicating Value

Oregon Heritage expanded their ability to share stories related to the value of heritage by creating the Oregon Heritage Exchange Blog, the [Sharing the Value of Heritage toolkit](#), and by sharing resources and opportunities in the weekly Oregon Heritage News, an e-newsletter.

4. Supporting Organizations

The Oregon Heritage MentorCorps program is a direct result of this recommendation. The program offers peer-to-peer support for heritage best practices, nonprofit resources and training, as well as emergency management assistance.

Heritage organizations have changed, adapted, and faced significant new challenges since 2010. From the COVID-19 Pandemic to the increasing severity and impacts of natural disasters (particularly wildfires) to an increase in social upheaval and political divide, heritage organizations now operate in a much-changed landscape compared to 2010. Those who document, preserve, and share history are also recognizing how mainstream narratives often leave out perspectives such as those of the Black, Indigenous and People of Color (BIPOC) and LGBTQIA+ communities. Heritage organizations are exploring what it means to share more inclusive stories.

While many of the issues identified in 2010 persist today to varying degrees, much has also changed. The 2024 Vitality Study investigates where heritage organizations see themselves today and offers options for addressing the current challenges at the state, regional, and local level.

¹ ECONorthwest. "Economic Impacts and Value of Oregon's Heritage Organizations and Events," 2022.



Methods

The 2024 Vitality Study was shepherded by an Advisory Group representing statewide technical support organizations and included a survey of Oregon heritage organizations, a literature review, and interviews and workshops with local heritage representatives. A total of 264 organizational representatives responded to a detailed survey, ten heritage sector representatives were interviewed, and nearly sixty organizations were represented in six workshops across Oregon.

Advisory Group

At the study's initiation, Oregon Heritage staff identified six representatives from organizations that provide resources, support, and technical assistance to local heritage organizations. These included:

- Cultural Advocacy Coalition of Oregon
- Oregon Cultural Trust
- Oregon Heritage Commission
- Oregon Historical Society
- Oregon Museums Association
- Restore Oregon

Oregon Heritage staff also participated in the Advisory Group. The group met four times throughout the project to provide the University of Oregon's Institute for Policy Research & Engagement (IPRE) research team with input on findings from engagement with heritage organizations. In the final three meetings, the Advisory Group worked with the IPRE team to build out and refine the recommendations included in this report.

Survey

In January of 2024, Oregon Heritage staff distributed a survey to heritage organizations across the state to better understand their operations and priorities. The survey provided neutral and standardized questions to be answered by organizations in their own time. The responses provided were anonymous,



Workshop in La Grande – April 2024



thereby allowing organizations to answer as honestly as possible. The survey included the following categories of questions:

- **Demographics:** covered questions about the type of organization (museum, certified local government, etc.) and type of organizational structure (nonprofit, private, etc.).
- **Issues:** contained questions regarding the most pressing current and emerging concerns as well as what resources respondents thought were at most risk.
- **Programming:** inquired after initiatives organizations intended to pursue in the next three years regarding their collections, historic properties, and programming.
- **Formal structure:** asked about what documents organizations have, such as mission statements, strategic plans, collections policies, emergency plans, etc.
- **Communications:** asked what type of public relations strategies organizations have in place.
- **Collaboration:** asked if organizations collaborate, and if so, what that collaboration looks like for their organization.
- **Patrons:** gathered information about whether organizations had public-facing operations, and if so, asked organizations for details about their visitors.
- **Staff:** helped delineate which organizations have staff—paid, part-time, or volunteer—as well as details about how many hours those staff and volunteers contribute.
- **Budget:** asked respondents to estimate their operational and capital budgets as well as list their funding sources.
- **Finance and Grants:** asked about what types of fundraising organizations participate in, including details about organizations’ interaction with grant funding, and any cost-saving measures they may have engaged in.
- **Open-Ended Final Question:** the survey’s last question gave an open-ended option for respondents to add any remaining thoughts (a total of 14% of respondents responded to this question).

Oregon Heritage staff facilitated online outreach for survey distribution, including social media posts, a banner on their webpage, and emails to industry listservs and heritage networks across the state. Additionally, Oregon Heritage sent a postcard with an invitation to the Oregon Heritage Conference and a QR code linking to the survey, and sent letters to over 150 organizations including the QR code, the survey link, and an offer to send a printed copy of the survey or to conduct the survey verbally over the phone. While the survey was open, staff at Oregon Heritage communicated frequently with organizations to remind them of deadlines and encourage participation. While the budget for this project did not cover a mailed survey, future surveys should consider this option since print is the preferred format for many heritage organization staff and volunteers.

The survey received a total of 264 complete or partial responses between January 22, 2024, and February 28, 2024. The survey was designed to take roughly 20-30 minutes to complete and included the chance to win free entry to the Heritage Conference in April of 2024 as an incentive for participation.



The survey responses are the source of all the data included in this report, unless otherwise listed. Appendix B includes a summary of survey responses.

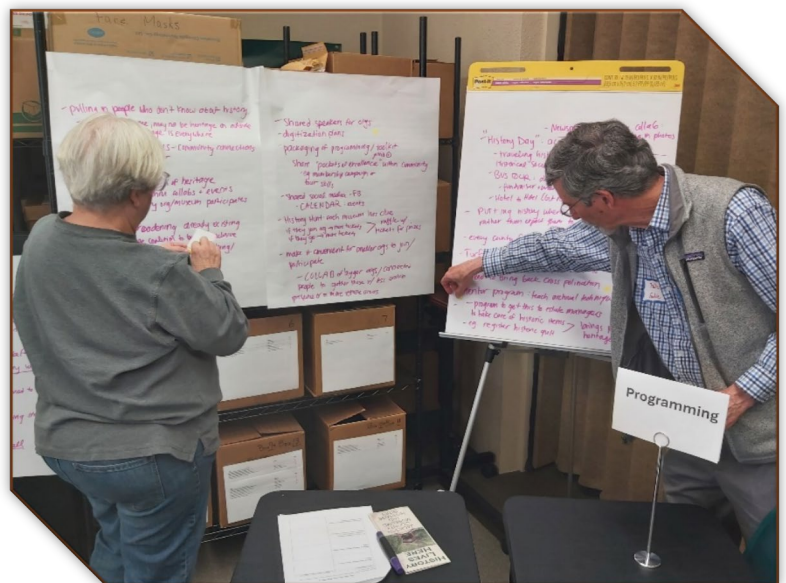
Note About 2010-2024 Comparison: The intention of this study was to determine the current concerns for heritage organizations. The data from the 2010 Vitality Survey are not directly comparable to the 2024 Vitality Survey because of changes and streamlining to the survey's design.

The 2024 survey encompassed more organization types and asked an expanded set of questions about operations. Despite these changes, a handful of key questions kept the same elements and are possible to compare. The resulting data demonstrate overlapping concerns from the 2010 study, but also emerging new issues.

Interviews

The IPRE research team interviewed ten heritage sector representatives in a variety of positions and organization types to gather additional details and experience to complement the survey findings. These interviews allowed the researchers to better understand Oregon heritage organizations' needs and provide context to the survey data. The interviews covered a broad range of topics, often taking an individualized direction based on the interests of the interviewee. All interviews covered the following:

- **Programming** – questions regarding the triumphs and challenges of organizations' programming.
- **Collaborations** – questions about past collaborations, including reasons for success in collaborations and discussion about barriers to collaborations.
- **Funding** – questions about how the interviewee's organization goes about securing funding, their challenges with those methods, and the successes they've had.
- **Staff and Volunteers** – questions about how they staff their organization and staffing triumphs and challenges.
- **The Heritage Sector** – questions inviting organizations to share their greatest concerns for the heritage sector and ideas about how to address these issues.



Workshop in Rogue Valley – April 2024

The researchers took detailed notes from the interviews using recorded videos and/or transcriptions. Appendix C includes a summary of interview notes and key themes, but the transcripts and videos remain confidential.





Workshop in Coos Bay – April 2024

Workshops

To capture a variety of perspectives from different heritage representatives in the state, the IPRE research team conducted five workshops across Oregon and one online workshop. The goal of the workshops was to present the preliminary study findings to heritage organizations and ask them to brainstorm solutions to the issues presented. Workshop attendees rotated between four groups that covered issues related to funding, relevancy, programming, and staffing to share their experiences and ideas.

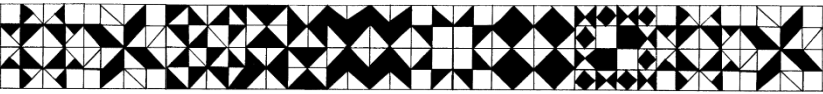
It was important to the research team and to Oregon Heritage to host workshops in locations that could allow easier access for more rural and isolated heritage representatives to participate. The following is the list of workshop locations:

- Cascade Locks, hosted at the Gorge Beer Company
- Coos Bay, hosted at the Coos History Museum
- Forest Grove, hosted at the Forest Grove Library
- La Grande, hosted at the Cook Memorial Library
- Medford, hosted at the Rogue Valley Genealogical Society Library
- Virtual Workshop, hosted by the research team through Zoom

The summary of each workshop, including recommendations brainstormed by participants and their prioritization of these recommendations, are in Appendix D.



2. Oregon Heritage Then & Now



This chapter highlights changes in the heritage context since the original 2010 Vitality Study by documenting major events and trends that have impacted the heritage community locally and nationally. These developments have shaped priorities and agendas in the field of heritage preservation and provide background for the issues discussed in Chapter 3. This chapter concludes with a snapshot of the current heritage landscape in Oregon based on information about operations and concerns shared by those who took the survey. The snapshot helps situate the current top issues in the heritage sector that are described in Chapter 3.

A Changing Landscape

In 2010, the heritage sector was grappling with the fallout of economic recession. In 2024, the heritage sector is still adjusting and reorienting in a post-pandemic world. Behaviors have changed, funding has fluctuated drastically, and there is an increasing push to make heritage more inclusive of voices and cultures that mainstream narratives have overlooked or excluded. The following sections document some of the larger scale events and shifts that have impacted the heritage preservation field.

COVID-19 Pandemic

Beginning in 2020, the COVID-19 pandemic claimed millions of lives and ground the global economy to a halt. The operations of heritage organizations, particularly those with a public-facing, physical component, were upended. Funding became uncertain as governments scrambled to direct resources towards the public health crisis and anticipate falling revenues from impending economic decline. Oregon Heritage itself had to cut staff and scale back budgets as the State reallocated resources and managed budget shortfalls.

In this context, heritage organizations had no choice but to adapt – and quickly. Some organizations were lost to the pandemic, unable to sustain operations. Others adapted and reimaged their programs and delivery. The vast majority are still trying to stabilize, rebuild, and move forward. The pandemic altered the

“Since COVID closures, the number of visitors and tour groups has not returned to levels prior to closures and thus lower revenues.”

– *Survey respondent*

“The COVID pandemic marked a serious decline in volunteer personnel and many organizations have not been able to attract new volunteers since that event. This has led to burnout in existing volunteers and ultimately is compromising the function of organizations.”

– *Survey respondent*



public’s desires and behaviors around travel and in-person activities. This new landscape can still feel uncertain for heritage organizations trying to adapt.

COVID State & National Response

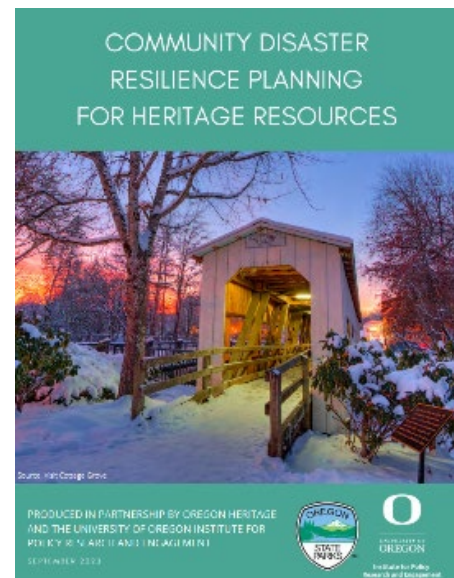
A few of the responses from state and national heritage preservation related entities follow:

- [REopening Archives, Libraries, and Museums \(REALM\)](#) - This project yielded a Public Health Crisis Management Playbook for Archives, Libraries, and Museums.
- [Oregon Heritage Plan Framework for Recovery](#), Oregon Heritage Commission
- [Reopening: What Museum Learned Leading Through a Crisis](#), American Alliance of Museum (AAM)
- [Oregon Cultural Trust](#)

Disasters

The Pacific Northwest already has the looming threat of a Cascadia Subduction Zone earthquake, but our changing climate has brought more weather extremes that increasingly cause devastation, disrupt daily life, and threaten heritage resources. The 2020 wildfires broke records held by previous years for devastation across the state , displacing thousands and destroying homes, businesses, and natural and cultural resources across Oregon. This trend continues in subsequent years with 2024 on the path to being recorded as the worst fire season on record in Oregon. Oregonians have become familiar with anticipating devastating wildfire seasons, consistent exposure to unhealthy levels of air quality, hotter and drier summers, and across the board inconsistency with seasonal expectations.

Heritage organizations are increasingly recognizing the need to plan for disasters. In a survey recently conducted for the 2024 update of the Oregon Historic Preservation Plan, respondents expressed the desire to increase planning efforts around disaster preparedness and recovery.² It is vital for organizations to spend time now preparing for the inevitable impacts of natural hazards so they are not scrambling in a time of crisis.



Oregon Heritage developed this Community Disaster Resilience Planning for Heritage Resources Guide in partnership with UO IPRE

² Oregon State Historic Preservation Office. “2024-2034 Oregon Historic Preservation Plan (Draft).” August 2024. P. 10.



According to the Center of the Future of Museums 2024 Trendswatch (p. 32):

“The risks facing museums themselves are clear and comprehensive. To name just a few:

- Over a third of US museums lie within 100 kilometers of the coast—a quarter in zones highly vulnerable to sea level rise and severe storms.
- Sixteen percent of Americans live in areas at high risk of wildfire—this will rise to 21 percent in the next three decades as the risk zones for fire expand. US museums, which tend to co-locate with population, face similar exposure.
- Museum buildings and HVAC systems were built for climate conditions that are rapidly becoming out of date. The stress on these systems, and costs of remediation, will only increase with time.
- As plant hardiness zones shift north, historic properties and botanic gardens face a future in which their original landscaping and collections cannot survive.
- The increase in the number of extreme heat days annually is encroaching on attendance and outdoor space rentals.
- The climate crisis is making insurance more expensive. Major insurers have already stopped writing new policies in California, Florida, and Louisiana, and this list of “uninsurable” areas is expected to grow.
- Climate risk will put additional pressure on museums racing to document and preserve archaeological sites, habitats, and endangered species.”

Disaster State & National Response

A few of the responses from state and national heritage preservation related entities follow:

- [Culture in City Reconstruction & Recovery](#), UNESCO
- [Value of Heritage in Disaster Resilience Report and Messaging Guide](#), Oregon Heritage Commission
- [Fact Sheet on Art & Culture: Helping People Before, During, and After Disasters](#), FEMA
- [Guide to Expanding Mitigation: Making the Connection with Arts and Culture](#), FEMA
- [Climate Heritage Network](#)
- [Leading the Change Together - Goal 5: Climate Resilience](#). Conserve, reuse, and retrofit older buildings to reduce carbon emissions, while at the same time adapting historic places to withstand current and future climate impacts, National Trust for Historic Preservation
- [Preservation Initiatives: Climate Change & Sustainability](#), Advisory Council on Historic Preservation

Social Upheaval and Political Divide

Racial inequality, gender rights, historical injustices, political unrest, political polarization, and more have resulted in increased tensions across the country, most noticeably since 2020.



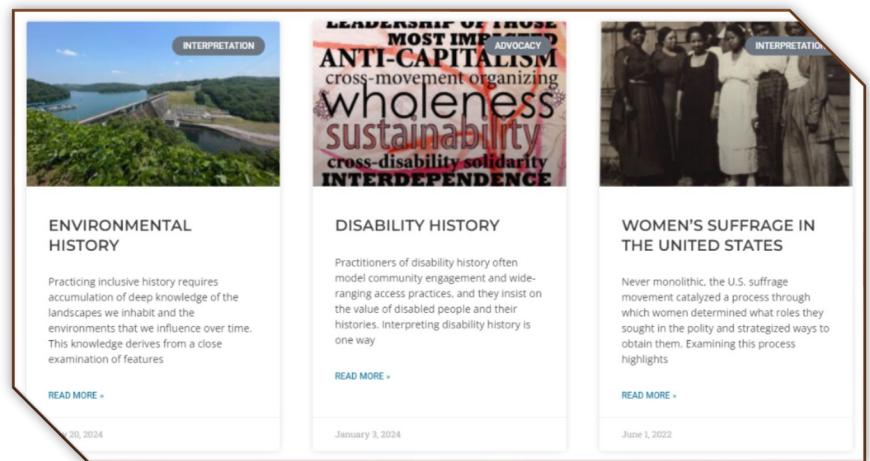
Public responses have included protests, demonstrations, and marches, some of which resulted in human injury and infrastructure and property damage.³ The widening political divide and polarization have resulted in a breakdown of civil engagement and discourse in public meeting spaces at the local and state level in addition to gathering spaces.

Calls for action have put pressure on the heritage preservation community to acknowledge and address practices that have historically resulted in under-documentation and under-representation of marginalized populations and, in some cases, perpetuated oppression. Further complicating this work is navigating the political divide while addressing social injustice in the field of heritage preservation.

As predicted by a 2021 Horizon Scan study, *Anticipating Futures for Heritage*, issued by the International Centre for the Study of the Preservation and Restoration of Cultural Property (ICCROM), "The predicted deepening of inequalities within and between countries means that heritage may become increasingly politicized: as a tool of soft power between nations, and as a means to influence popular opinion in favor of political agendas. Meanwhile, in response to historic and systemic injustice, demands by marginalized communities and groupings for their right to cultural representation may become louder and more forceful."⁴

Here in Oregon, responding to these calls for action has been a focus of the heritage preservation community and includes work related to:

- Decolonization and reparative work⁵
- Shared authority in identifying, preserving, and sharing diverse historical perspectives
- Documentation of places associated with under-represented populations⁶
- Addressing oppression, harm, and trauma occurring from public monuments, place names, collection information, collection material, exhibits, interpretation, and more⁷



The Inclusive Historian's Handbook includes resources for equity-focused historical work

³ Sources reviewed for data on protests, riots, demonstration trends include: <https://acleddata.com/2019/11/05/assessing-political-violence-demonstrations-in-the-united-states-acledd-pilot-data-preliminary-findings/>, <https://acleddata.com/us-crisis-monitor/>, <https://ash.harvard.edu/programs/crowd-counting-consortium/>

⁴ https://www.iccrom.org/sites/default/files/publications/2023-11/anticipating_futures_web_pdf.pdf

⁵ <https://www.opb.org/article/2023/12/12/indigenous-movement-decolonize-museums-gains-momentum-oregon/>

⁶ <https://oregonheritage.wordpress.com/2020/07/13/black-historic-places-matter/>, <https://youtu.be/1ENK991cVKA>

⁷ OSU place names <https://leadership.oregonstate.edu/building-and-place-names>, fellowship paper <https://www.oregon.gov/oprd/OH/Documents/Fellow2019MarcCarpenterReconsideringThe%20Pioneer.pdf>, harm and trauma report https://www.oregon.gov/oprd/OH/Documents/Report_Addressing_Harmful_Content_2024.pdf



State & National Priorities and Initiatives

- 2020-2025 [Oregon Heritage Plan](#), Oregon Heritage Commission- **Goal 1: Include More Voices.** Expand the narrative of history told and preserved in the state to capture previously excluded or marginalized voices for a more complex -and accurate depiction of Oregon’s historical events.
- 2024-2033 Oregon Historic Preservation Plan, Oregon Heritage/State Historic Preservation Office – Goal D: Increase the number and thematic diversity of cultural resources identified, evaluated, designated, and protected in Oregon.
- [Leading the Change Together – Goal 7: A Truer History.](#), National Trust for Historic Preservation Expand interpretation and truth telling at historic places to reflect an inclusive and multilayered shared history to advance justice and equity.
- [Reframing History](#), American Association for State & Local History (AASLH)
- [The Inclusive Historian’s Handbook](#), American Association for State & Local History and National Council on Public History
- [Standards for Museums with Native American Collections](#), School for Advanced Research & American Alliance of Museums
- [The Next Horizon of Museum Practice: Voluntary Repatriation, Restitution, and Reparations](#), Center for the Future of Museums

Diversity, Equity, Inclusion, and Access

As more discussion and actions arise from social movements, momentum is growing in the heritage sector to expand the perspectives represented in narratives about the past. This is coupled with a focus on diversity, equity, inclusion, and access for those who work, volunteer, and interact with heritage organizations, programs, and resources.

Like many professional fields in the U.S., the racial, ethnic, gender, and sexuality make-up of heritage professions has not reflected the diversity of the American public. The American Institute for Conservation (AIC) and the Foundation for Advancement in Conservation, for example, point out that the AIC “was incorporated in 1972 by a group of white conservation professionals to represent a largely white field,” and that “since then, the demographics of the association and foundation, and particularly leadership, have remained fairly homogeneous, reinforcing the existing power structures in the field of cultural heritage preservation and reflecting the pervasive inequity in the United States.”⁸

Those in the heritage field are increasingly seeking to change this. Work on the most recent Oregon Historic Preservation Plan revealed that heritage professionals are calling for greater

⁸ The American Institute for Conservation (AIC) and the Foundation for Advancement in Conservation. “About Us: Diversity, Equity, Inclusion, Accessibility.” May 2, 2022. <https://www.culturalheritage.org/about-us/deia>. Accessed 8/23/24.



representation in the field and fewer barriers to participation in programming.⁹ The plan documents that “Oregonians want to see themselves and their stories in the buildings, places, archives, collections, and traditions we preserve, and they support devoting time and money to accomplish this critical work.”¹⁰

Conversations and action to create more inclusive spaces in the heritage sector are happening at all levels in Oregon. Statewide technical assistance providers are offering resources and facilitating dialogue around topics of equity, justice, and access. Funders are prioritizing support for projects and initiatives that address the stories and access of previously under-represented groups. Individual organizations are exploring ways to make their work and their staff and leadership more representative of the Oregon experience.

Diversity, Equity, Inclusion, and Access State & National Response

Statewide and National Priorities related to this work include, but are not limited to:

- [2020-2025 Oregon Heritage Plan](#), Oregon Heritage Commission - **Goal 1: Include More Voices:** Expand the narrative of history told and preserved in the state to capture previously excluded or marginalized voices for a more complex and accurate depiction of Oregon’s historical events. **Goal 2: Increase Access to Heritage:** Strive to engage more community members and visitors in local heritage by increasing awareness of resources and making them available to diverse audiences and potential stakeholders.
- 2024-2033 Oregon Historic Preservation Plan, Oregon Heritage/State Historic Preservation Office – **Goal A:** Build well-resourced heritage organizations that represent the diversity and values of their communities
- [American Institute for Conservation \(AIC\) and the Foundation for Advancement in Conservation \(FAIC\)](#) have launched new committees and initiatives and developed new resources for their membership.
- National Trust for Historic Preservation [Leading Together for Change - Goal 2: Inclusive Movement](#) - Increase the diversity of people who are empowered to lead and carry out preservation work to ensure that the movement better represents our diverse heritage.”
- The American Alliance of Museums [Excellence in Diversity, Equity, Accessibility, Inclusion Report](#)
- Society for American Archaeology [Equity Initiatives](#)

⁹ Oregon State Historic Preservation Office. “2024-2034 Oregon Historic Preservation Plan (Draft).” August 2024. Page 16.

¹⁰ *Ibid.* (Page 6)



Additional Sources of Information about Trends and Priorities in the Heritage Sector

[National Trust for Historic Preservation](#): (Goals) collaborative networks, climate resilience, inclusive movement, engagement public, a truer history, modernized expanded tools, equitable communities.

[Advisory Council on Historic Preservation](#): (Initiatives) Housing and Historic Preservation, Climate Change and Sustainability, Youth Outreach, Tradition Trades Training, Inclusiveness, Leveraging Federal Historic Buildings, Community Revitalization and Economic Benefits, Careers in Preservation.

[The American Alliance of Museums](#): (Priorities) Social & Community Impact, Diversity, Equity, Accessibility, and Inclusion (DEAI) and Anti-Racism, The Museum Community, The Way We Work

[Center for the Future of Museums](#): (Trends) 2022: Education for our children, Livable communities for our elders, Mental health, Emergency response in the face of disasters, A human-centered culture of sustainability, 2023: Future Workplace, A Digital (R)evolution, The Partisan Divide, 2024: Culture Wars 2.0, AI Adolescence, Decarbonizing the future

[The American Institute for Conservation](#): (Values) Community; Diversity; Equity, Inclusion, and Access; Professional and Personal Growth; Sustainability; Accountability

[Anticipating Futures for Heritage ICCROM Foresight Initiative Horizon Scan Study 2021](#): Details political, environmental, societal, technological, and economic trends that are impacting heritage

Oregon Heritage Today

What do we know about the organizations working in Oregon’s heritage sector today? To get a better understanding of the makeup, concerns, and priorities of heritage organizations, we asked our vitality survey respondents to provide detailed information about the organizations they represent. The following sections summarize details about organizations’ operational models, top concerns, future plans, and funding status.

For additional information, see Appendix B in this report (full survey responses) and the [Oregon Heritage Organization Profiles](#), a companion data summary for the 2024 Vitality Study.

Organizations by the Numbers

Based on the 2024 vitality survey, heritage organizations in Oregon are most often nonprofits, at 47% of respondents. The predominant type of heritage organizations (40% of respondents) are history, arts, science, or culture museums. While the majority of organizations who responded to the survey have a mission statement (76% of respondents), the majority (58% or



more of respondents) do not have several important operational plans and documents, including strategic plans, collection management plans, volunteer manuals, and emergency plans. Documents like these help with day-to-day operations and ensure staff are prepared to deal with unexpected circumstances that may arise; absence of these strategies raises concerns about organizational health and resilience.

Organizational Structure

Organization Governance (n=239)
Nonprofit 47%
Local government 16%
Private for-profit business 12%
State government 5%

Organization Type (n=264)
Museums 40%
Place-based 16%
Third-Party Support 16%
Archives 13%

Organizational Documentation

Organizations Currently <u>Have</u> : (n=207)
Mission Statement 76%
Bylaws 56%
Collection policy 53%
Strategic plan 42%

Organizations Currently <u>Missing</u> : (n=207)
Strategic plan 58%
Collection management plan 83%
Volunteer manual 83%
Emergency plan 72%



Concerns at a Glance

The overarching concerns of heritage organizations today pertain mainly to staying relevant and managing resources, including both physical resources and staff/volunteers.

Concerns about staffing and facilities maintenance occur both in current and emerging concerns. A higher percentage of organizations list their facilities issues as a top concern in emerging issues, which indicates that their present-day concerns about facilities are growing in severity. Aging structures and facilities have increasing maintenance needs, and the skilled labor needed to address those issues is increasingly more expensive and difficult to recruit.

Organizations have had persistent concerns about the long-term sustainability of their volunteer workforce. Their current and emerging concerns draw connections between current staff burnout, diminishing interest in volunteerism, and a perceived reduction in emerging professionals in the field.

The role of heritage in contemporary society is also up for discussion, with the third and fourth highest emerging concerns pertaining to how heritage presents and connects within communities and visitors.

The preservation of historic photos, film, documents, and rare books alongside the fear of losing Indigenous languages plays into organizations' concerns about their ability to engage in heritage/preservation best practices. Organization's lack of staff capacity may exacerbate concerns about the process of preserving these historic artifacts and languages.

Top Four Most Pressing Current Issues (n=232)

- 44% Keeping heritage and cultural organization viable and relevant
- 41% Balancing best practices with lack of capacity
- 38% Maintaining or restoring historic structures resources in light of rising costs
- 34% Volunteer or staff burnout

Top Five Emerging Issues (n=228)

- 58% Facilities issues rising expense of land /building /maintenance
- 41% Unstable volunteer count impacting ability to maintain operations
- 31% Tensions over what stories identities get represented by whom and how they're represented
- 29% Decisions related to the role of heritage organizations and responding to social economic and community issues
- 29% Fewer emerging professionals interested in heritage related professions



Organizations believe two types of built resources are most in peril: smaller homes in desirable neighborhoods and traditional cultural sites, which connects to organizations' concerns about facilities and structural maintenance.

Top Resources in Peril (n=227)

41% Historic photos, film, documents, rare book collections

33% Indigenous languages

30% Smaller homes and very desirable residential neighborhoods (the tear down and replace issue)

30% Traditional cultural sites

Future Plans

Many organizations are planning to engage in various activities in the future to further their mission and contribute to the heritage sector. The top three strategies organizations have for their collection, historic properties, and programs reveals what heritage organizations prioritize and which avenues of change they think may be necessary to preserve Oregon's history. A higher percentage of organizations are altering existing exhibits rather than opening new permanent exhibits, which may be linked to organizations' concerns about interfacing with best practices and staying relevant to their audiences.

Top Three Plans for the Future
(by percentage of respondents planning to undertake the activity)

Collections Plans for Next Three Years (n=170)	Make collections digitally accessible to the public 58%	Start/continue a changing exhibit program 55%	Open or revamp a new permanent exhibition 39%
Historic Properties Initiatives for Next Three Years (n=112)	Develop a long-range plan 48%	Brick-and-mortar rehabilitation work on historic property 48%	Launch a capital campaign to fund renovation or rehabilitation of a historic property 39%
Program-Related Activities in Next Three Years (n=195)	Public education activities (plaques, walking tour booklets, websites etc.) 70%	Collect and make available historic photos and other records about history/heritage 61%	Launch a new website or online resource to communicate about program(s) 37%

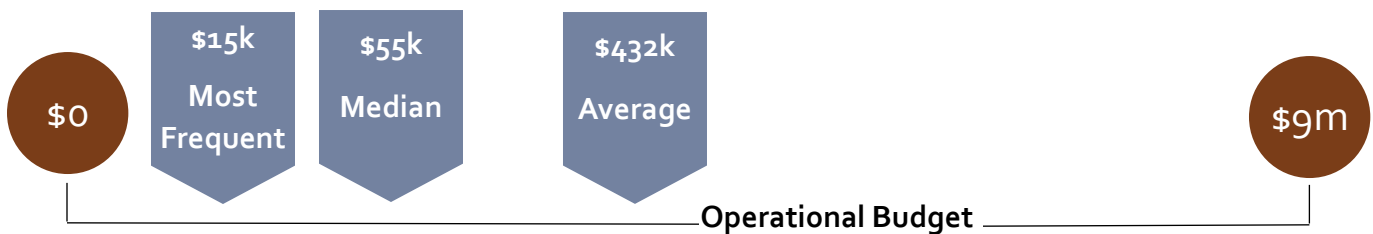


Despite 58% of organizations listing facilities and maintenance issues as their top emerging concern, only 39% intend to launch a capital campaign for renovation funding in the coming years. Additionally, organization representatives frequently stated in workshop sessions that a lack of funding caused their facilities and maintenance issues. There is a disconnect between organizations’ concerns and their ability to address them. It might be that organizations would be able to better address their concerns if they had a strategic plan in place or were able to collaborate with other organizations to launch capital campaigns.

Funding

Funding is a large and complex issue affecting the Oregon heritage sector today. As the source of an organization’s ability to continue its work and pay its staff, a lack of funding affects every aspect of potential for success. Organizations within the sector vary greatly in size and budget. Survey respondents reported budgets from \$0 per year to \$9 million. The most frequently reported operational budget was \$15,000, with a median of \$55,000 and an average of \$432,000 overall. This broad range highlights the widely different funding situations of heritage organizations and the myriad needs of these organizations.

Oregon Heritage Organizational Budget Range and Details in 2024 (n=146)



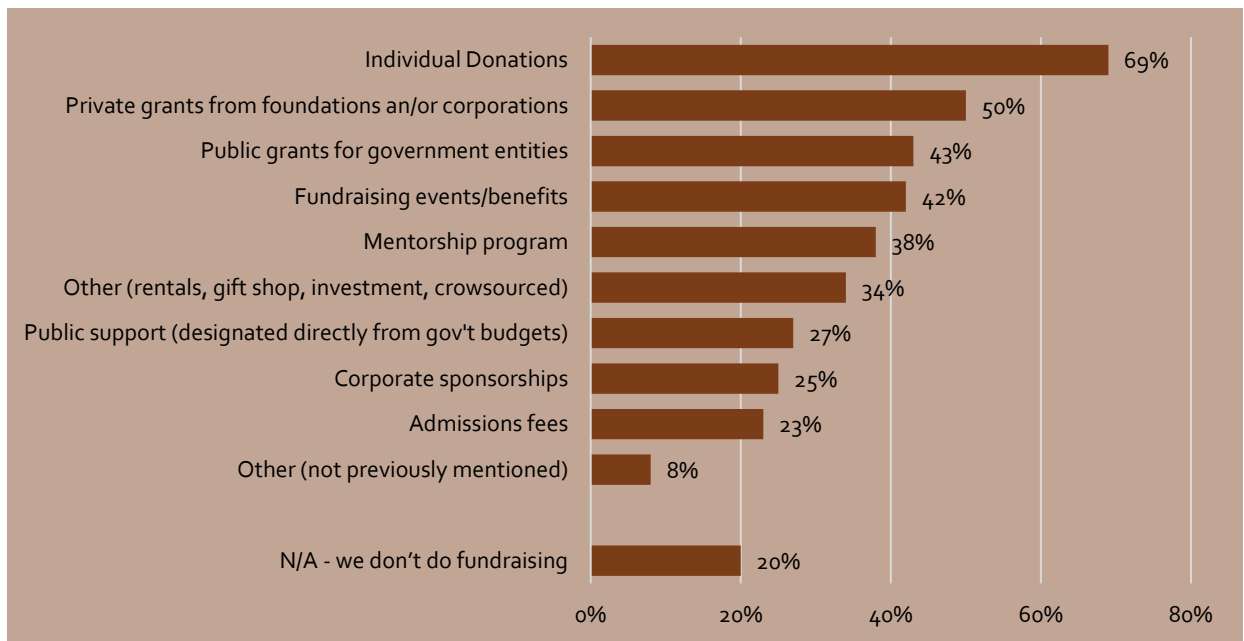
Funding sources varied amongst organizations. Sixty-nine percent of survey respondents noted that they pursued individual donations, 50% pursued private grants from foundations and/or corporations, and 43% pursued public grants from government entities. Organizations found the most success with applying to local grants, with an average of 73% success rates. State grants boast a 71% success rate, private grant funding had an average of a 69% success rate, and federal grants had the lowest success rate at 63%.

Grant Success Rate

Local Grants (n=45)	State Grants (n=58)	Private Grants (n=79)	Federal Grants (n=15)
73%	71%	69%	63%

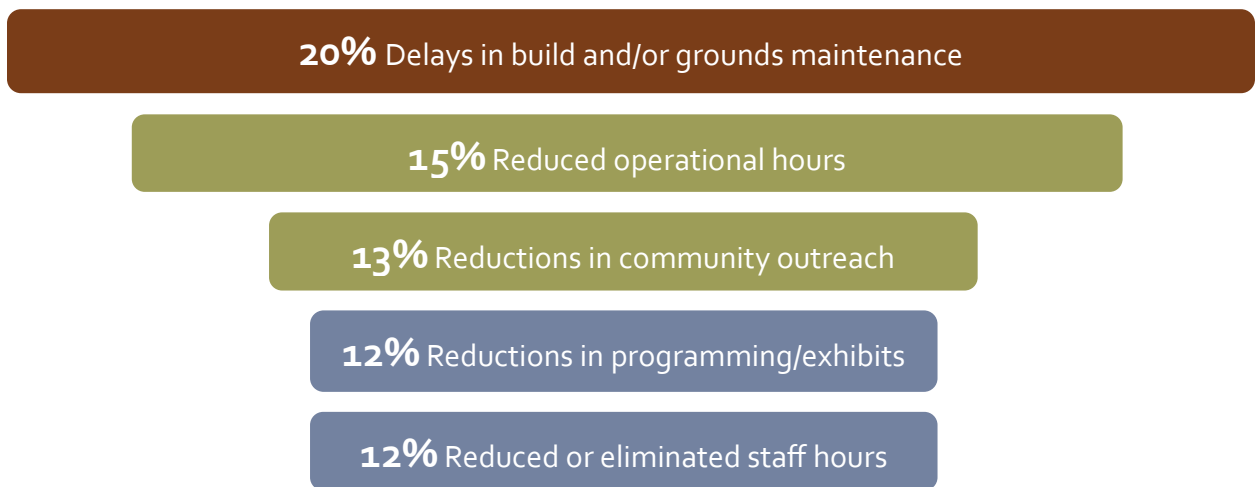


Fundraising Strategies Pursued in the Past Three Years (n=173)

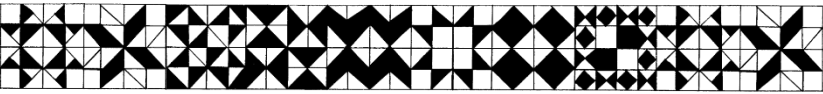


About half of Oregon heritage organizations have engaged in some form of cost-saving strategy in the last three years. Twenty percent of organizations delayed building and/or grounds maintenance in an effort to cut costs, while 12% of organizations had to engage in severe cost reduction strategies by cutting staff and/or programming. As at least 80% of survey respondents noted an increase or no change in demand for their services, we see a juxtaposition of funding difficulties next to an increasing set of needs from organizations to meet demand.

Cost Savings Strategies (n=163)



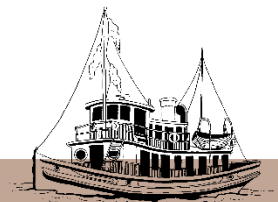
3. Current Issues



Engagement with heritage organizations throughout the 2024 Vitality Study illuminated issues related to capacity, staffing, funding, deferred maintenance, and the changing approaches to sharing and preserving heritage. This chapter examines all these concerns in depth, discussing nine topics and sharing examples of each topic from heritage organizations’ survey responses, interview comments, and workshop feedback.

While this chapter discusses nine different issues, it is important to note that these issues are all interconnected. The intertwined nature of these topics means that the circumstances causing one issue are likely linked to and affected by several of the other issues described. Together, these nine issues paint an intricate picture of the current state of the Oregon heritage sector and highlight where heritage supporters will need to focus their efforts to increase the sector’s vitality in the years to come.

Issue 1: Heritage Resources are at Risk



Perceived competing needs, fragile organizations, and disasters are risks for heritage resources like historic properties, historic photos and documents, traditional cultural sites, and Indigenous languages. Difficulties supporting, funding, and promoting the value of these resources make it difficult to garner support to protect them.

Oregon heritage organizations are currently experiencing operational fragility, largely due to a lack of secure funding avenues for operational costs. This often leads to a lack of capacity for staff to create disaster and succession plans, participate in opportunities to learn about nonprofit management, plan and prioritize collection care, and preserve aging facilities and structures. Because organizations lack capacity to invest in longer-term plans and strategies, the resources organizations aim to protect—historic properties, historic photos and documents, cultural materials, traditional cultural sites, Indigenous languages, etc.—are in danger of deteriorating, sustaining damage, or being lost.

Particularly, as the built resources show signs of deterioration due to lack of funds and organizational capacity for upkeep, it becomes increasingly important to invest in facility restoration and maintenance. Without protection and planning, these historic buildings and lands fall into disrepair or are repurposed for new developments. Most organizations do not



have a disaster plan to save important heritage resources if there were a flood, fire, or other natural disaster. Similarly, most organizations do not have a succession plan to ensure their organization's longevity after current leadership ages out. Most of this is due to staff capacity and lack of funding for operational expenses. Organizations need adequate funding to manage their operations and pursue their heritage preservation missions. The risk of organization dissolution due to operational issues or disruptions puts heritage resources in danger.

- Survey, interview, and workshop participants mentioned a lack of knowledge and resources to engage in best practices for budgeting, particularly for operational budgets like recruiting, training, and development.
- 83% of survey respondents don't have a collections management plan, 72% of survey respondents don't have an emergency plan, and 58% of organizations don't have a strategic plan. (n=207)
- 44% of survey respondents identified struggling to balance "best practices" with limited capacity as a pressing concern in the heritage sector currently (the second highest ranked concern among 19 options). (n=232)
- Survey, workshop, and interview participants expressed that heritage funders are less likely to support building maintenance and repair, despite these expenses becoming an increasingly larger portion of organizations' budgets.

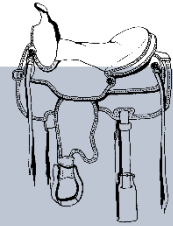
From the Field...

"Collection management is a challenge for [this organization]. We are currently working with curation facilities to ensure that all collections are appropriately managed and stored. There are fewer curation facilities that are taking on additional collections, and some are struggling in management of the ones that they do have. I see this as a statewide issue, and not specific to [us]."

"Our old building does not have environment-control rooms to store our old and rare books; the dust and dryness have negatively affected the preservation process while we still attempt to provide access (somewhat) to these materials."

"As [availability] of storage space declines (local library and closure of local museums) and the death or health of older citizens means more and more material is given to me to safeguard, the lack of space and time makes continuing research on historical topics and cemetery activities more challenging and leads to my own burnout and frustration at not being able to do a better job preserving history."

"Urgent internal response is necessary to plan for climate resiliency. Considerations are necessary to protect our properties increasingly at risk to extreme weather patterns, a backlog of differed maintenance, and a lack of institutionalized guidance regarding sustainable building, renovation, and restoration practices."



Issue 2: Value of Heritage is Under-Recognized



Heritage organizations have difficulty promoting their value and role in the community as an economic and social benefit.

The ability to effectively convey the value of heritage serves as the foundation for all heritage-related activities. When organizations struggle to attract community attention and support, it diminishes their ability to acquire funding and build out programming. The struggle to clearly convey a value proposition stems from difficulties expressing heritage's economic and social significance.

In years past, concern revolved around the scarcity of research to accurately depict heritage's economic impacts. Subsequent efforts, such as the publication of economic impact reports, have contributed to a more accessible understanding of heritage's economic value.

However, the challenge now extends to combating biases and enhancing inclusivity within the heritage sector. When community members don't see their cultural heritage and stories reflected in the offerings of heritage organizations, they may struggle to find value in these offerings. By diversifying narratives, heritage organizations can ensure relevance across a broader spectrum of audiences.

Despite some progress in recent years, heritage organizations still have work to do in demonstrating their economic and social value to the community. The inability to articulate value hampers organizations' capacity to secure funding, recruit new staff, and subsequently use these resources to enhance programming. Ensuring the vitality of the heritage sector in the years ahead will require a concerted effort to increase inclusivity and communicate the sector's value effectively.

- 44% of survey respondents said that keeping heritage and cultural organizations viable and relevant was the most pressing issue affecting the heritage sector now (the highest reported pressing issue). (n=232)

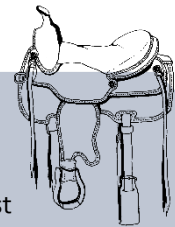
From the Field...

"[I feel that] elected leaders have no understanding or respect for the past and no interest in learning how history can help them make more responsible decisions... their staff have no experience in cultural resource management and their board shows little interest in understanding the importance of their unique vernacular cultural landscape."

"We know that our events provide a service to federal and state agencies that supports their public outreach mission & goals, yet there is limited financial support from agencies."

"We have an ongoing struggle with education of new property/building owners understanding the value in restoration and preservation versus replacement of historic materials on buildings."

"I would like to ignite the interest of the public in history and historic cultural resources to the point that the public values those things enough to fund their preservation and interpretation."



Issue 3: Connecting Organizations to Resources



A multitude of resources are available to assist organizations with training, funding, and technical support. However, many heritage organizations are unaware of these resources or lack the capacity to access them.

A notable challenge in the heritage sector is the disconnect between organizations and available resources, emerging from a lack of organizational capacity and centralization of resources. Oregon Heritage has taken extensive measures to collect valuable resources to share with affiliate organizations. Although Oregon Heritage and other statewide partners have assembled and regularly promote a wide range of invaluable resources, many organizations seem unaware of their existence and still report experiencing many of the issues these resources sought to improve. For example, several workshop attendees requested things like toolkits for public engagement and nonprofit management. Oregon Heritage has previously created a Sharing the Value of Heritage toolkit, which is located on their website, and there are numerous online resources for nonprofit management that could answer heritage organizations' call for assistance. Increasing organizations' awareness and use of these preexisting resources remains a challenge.

While these resources are readily accessible, external factors create barriers, including internet unreliability, limited technological proficiency, preferred methods of receiving information, and lack of time to sort through an inundation of information from various sources. Overcoming these barriers requires innovative strategies to connect statewide resources with local organizations, ensuring that vital support reaches organizations that need it most. Support organizations that can connect heritage organizations with resources and assistance will have to re-examine their current partner outreach.

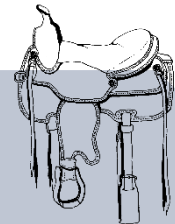
- 66% of respondents requested support from the state for learning about additional grant opportunities, 63% requested support from the state for grants to fund heritage projects, and 46% requested support from the state in technical and professional training opportunities. (n=195)
- 31% of respondents said that being unsure of what grants are available prevented them from applying to grants (the fourth highest reported barrier to applying to grants).

From the Field...

"We are not 'techy' – [we have] no website other than through the city website."

"Guidance, training, mentorship, and support is something desperately needed to ensure museums and staff do not unintentionally suffer for this lack of experience or experience burnout."

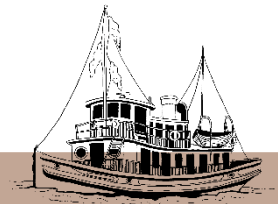
"We're building digital capacity, but we live in a very analog community. Helping our people become aware of what's available, and ensuring that it is accessible to and used by them, will be challenges in the short term."



Additionally, 13% of respondents said that uncertainty of grant application process prevented them from applying to grants (the seventh highest reported barrier to applying to grants). (n=150)

- Workshop participants discussed several barriers to online resources such as inadequate internet access in rural areas, lack of digital literacy amongst staff to properly access online materials, and lack of staff time and capacity to do research into existing resources.
- Workshop participants discussed that many resources such as conferences, which often require travel, were outside of their staff's capacity in terms of time and funding available.

Issue 4: Shifting Collections and Interpretive Themes



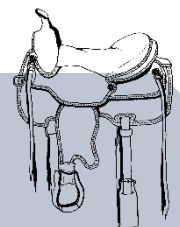
Many experiences have been excluded or underrepresented in the collection and curation of Oregon's history and heritage resources. Additionally, each passing year brings more history to collect and interpret. Incorporating this full history in the work of heritage organizations takes learning, planning, communication, collaboration, and support. The heritage sector is struggling to navigate shifting narratives and the competitive funding that comes along with it.

A lack of comfort or experience with navigating identity and representation in historical narratives can cause tension around choosing what stories to tell. As conversations about diversity, equity, and inclusion have become increasingly prominent (and at times, contentious) in American discourse, those in the heritage field are beginning to speak out about narratives that have been continuously under- or mis-represented. In response, funders in Oregon and elsewhere have begun to prioritize programming that shares narratives centered around justice, resilience, and trauma-healing.

Organizations focused on traditional narratives or those not centered around diverse stories have experienced new difficulty securing relevant funding opportunities, creating competition and tension in the sector. At the same time, organizations that desire to incorporate diverse narratives have reported concerns regarding resistance from their local communities. Organizations experience

From the Field...

"Museum board members, and sometimes staff members, are too often focused on continuing outdated programs and traditions, and are sometimes resistant to changes that will help our institutions remain relevant to younger generations."



internal conflict as well, as different staff and volunteers (including board members) disagree about the role of representation in their work.

These concerns demonstrate the potential disconnect between heritage organizations and the priorities of the communities they represent. Reactions of distrust and defensiveness rather than attempts to create conversation and understanding weaken the Oregon heritage sector as a whole. Healthy ways to navigate change must be uplifted to ensure that social and cultural shifts do not further damage the credibility and relevance of the heritage sector.

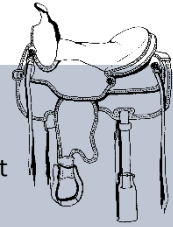
- 31% of survey respondents identified tensions over which historic narratives and identities are portrayed, by whom, and how they are represented (the third highest reported emerging issue). (n=228)
- In workshops, some organization representatives expressed openness and eagerness to incorporate diverse narratives into their programming, but staff capacity and expertise act as barriers.
- In an interview, an organization conveyed a history of conflicting opinions with local Indigenous populations concerning exhibit content, which has caused tensions between community groups and delays in programming.

From the Field...

"Native American issues are vitally important to our local story, and the role of white partners in telling Indian stories is changing rapidly. We are trying to bring in more tribal partners—this will be our great challenge in future."

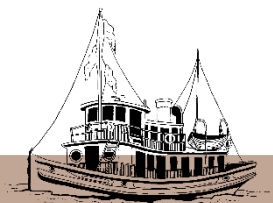
"Tension between the agricultural history of Oregon and the history of indigenous and minority groups require balancing these stories thoughtfully."

"Our project includes the indigenous presence on the site that we are working with. We have struggled with how to represent that presence without overshadowing the story that is the main focus of our project."



Issue 5: Continued Need for Well-Trained and Supported People

Heritage organizations face significant challenges in recruiting new staff and volunteers – including burnout, lack of available training, and barriers for emerging professionals. These issues hinder organizations' ability to sustain a dedicated and well-supported workforce essential for their operations.



The heritage sector experiences difficulties in acquiring and retaining staff and volunteers due to insufficient funding, public interest, and absence of incentives. Organizations heavily rely on volunteers to carry out daily operations – both external, programming-related, and internal,



business operations-related. Despite the passion and dedication of volunteers, many lack the necessary skills for crucial tasks. The overreliance on volunteers, without support, training and continued recruitment, hinders organizations' capacity for programming and engagement initiatives, and volunteers can struggle to maintain continuity and quality in internal operations (like strategic planning, recruitment and onboarding procedures, and board governance).

For paid staff, recruitment struggles stem from unattractive wages, strict job requirements, and inadequate practical skills of new professionals. Competition amongst organizations for existing heritage professionals further strains staffing efforts – in particular, organizations in rural areas have difficulty incentivizing new professionals to relocate and remain in the community.

According to a Nonprofit Association of Oregon survey, 23% of nonprofit organization respondents in Oregon reported having positions open that they have been unable to hire for, particularly mid-level employees.¹¹ Similarly, the American Alliance of Museums reported that 60% of museums nationwide have reported trouble filling open positions, particularly front-line roles such as guest services, admissions, and retail.¹² These numbers were reported to have increased due to the COVID-19 pandemic.

Staff recruitment and retention suffer due to local conditions and advancement opportunities. Organizations see difficulty recruiting staff due to a lack of housing affordable for professionals in the heritage sector pay grade. For those employed and looking to remain in the sector, lack of professional development opportunities can be a deterrent. Limited funding and capacity for trainings and a lack of training opportunities for individuals farther along in their careers can limit staff's ability to develop and advance in the field.

Finally, an emerging challenge facing organizations is the need for succession planning. As organizational leadership ages, organizations struggle to find capable successors due to a lack of staff/volunteer availability

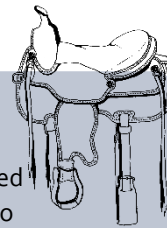
From the Field...

"While our organization has greatly expanded our community outreach and partnerships to keep us visible in the community, we suffer from needing more staff, especially development staffing, to aid with increasing our fundraising. Board turnover hurts and staff is getting burned out."

"The average age of our volunteers is around 70, with only a couple under the age of 40. How do we attract and engage younger volunteers who can take on leadership as we start to 'age out'?"

"We lost funding for our only staff member in the department about three years ago. As the administrator for the department, I'm the de facto person that the responsibility of our current digital repository materials falls."

"[A top emerging concern is] housing affordability for communities as well as for the nonprofit working professionals."



¹¹ Nonprofit Association of Oregon, "2024 Oregon Nonprofit Compensation and Benefits Report", 2024

¹² American Alliance of Museums, "National Snapshot of United States Museums", 2023



and training. Shifting demographics put heritage organizations at risk of losing rich expertise, significantly undermining the sustainability of operations.

- 34% of survey respondents reported volunteer/staff burnout as a current concern (the fourth highest reported current concern). (n=232)
- 44% percent of survey respondents identified struggling to balance “best practices” with limited capacity as a pressing concern in the heritage sector currently (the second highest reported current concern). (n=232)
- 41% of survey respondents identify an unstable volunteer corps as a top emerging concern (the second most reported emerging concern). (n=228)
- One interviewee disclosed the average age of their organization’s volunteer base is between 80-90 years old.
- 29% of respondents reported a decline in emerging professionals interested in the heritage field as a top emerging concern within the next decade (the fifth highest emerging concern). (n=228)

Issue 6: Coordination and Collaboration within the Heritage Sector



Heritage organizations report the desire to connect with each other and build a stronger network. While this work is happening, it could be enhanced and developed to be more inclusive and provide more concrete results.

Collaboration among heritage organizations can often be an important contribution to organizational well-being. It allows organizations to combine resources, build relationships, and mutually benefit from a broader influence. We found that many heritage organizations engage in collaborations, and with the broadening uses of technology and the internet, these partnerships have become more accessible. Examples include collaborations with consultants, partnerships between heritage organizations, and collaborations with local government and cultural entities.

Despite this, organizations often encounter challenges in establishing and sustaining meaningful connections. Collaborations that do take place are often passive and small online interactions (like cross-promotion on social media) rather than active relationship-building partnerships. Organizations have identified several barriers to engaging in more active partnerships, including staff capacity limitations, time constraints, and funding scarcity. Organizations also conveyed the absence of a cohesive network that could bring them together, such as regional and city or cross-city convening spaces. Heritage representatives



believed such collaborative networking efforts would promote communication and joint programming to ease funding and capacity barriers, indicating that this is an important support system to develop in the future.

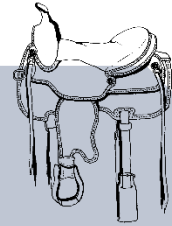
- 68% of heritage organizations reported participating in collaborations over the past three years (n=209). However, most of these collaborations were passive rather than active forms of partnerships. Fifty-eight percent of survey respondents engaged in cross-promotion via sharing website links (the most common form of collaboration chosen) (n=138).
- 80% of survey respondents reported a lack of staff capacity as the primary barrier to meaningful collaborations. Fifty-eight percent chose limited time availability (the second most reported barrier), followed by 41% of survey respondents choosing funding scarcity (the third highest reported barrier). (n=206)
- 42% of survey respondents selected “facilitating statewide/regional/local networks to support local heritage initiatives” as services that have been most useful to organizations (the fifth most reported choice). (n=195)
- In workshop conversations, organizations acknowledged missed opportunities to enhance their programming and allow for collaborative public engagement initiatives.

From the Field...

“[There is] limited availability of community partners due to the isolated nature of our facility in relation to neighboring communities.”

“We have a hard time getting people to show up to collaborative events consistently. One will be wildly popular, so we'll schedule more, and then nobody shows up to the next two.”

“A concerted effort to bring together local heritage organizations in a constructive and collaborative way [is a support system that would have the greatest impact on our work]”



Issue 7: Funding for Operational and Maintenance Needs

Heritage organizations report that facilities maintenance and staffing needs are big issues for the next ten years. Costs continue to increase, and funding sources often limit eligible projects based on funders' priorities and long-standing preferences to support specific initiatives over ongoing operations. This instability in funding and capacity impacts succession efforts and resilience.



Heritage organizations, particularly those structured as nonprofits, struggle to cover day-to-day operations costs like building and facilities maintenance and repair, staff salaries and wages, and staff and board professional development opportunities. According to an American Alliance of Museums report, half of museums lost revenue or had to make difficult decisions on



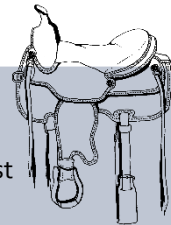
personnel, programs, or other expenditures in the aftermath of the COVID-19 pandemic. Similarly, 25% of museums dipped into their reserves or endowment to cover operating expenses.¹³ In particular, organizations expressed deep concern over where they can find funding for expensive capital improvements like historic building repair.

While organizations surveyed did generally report they draw funding from a diversity of sources (including grants, donations/fundraising, direct pass-through from government, and memberships/admissions fees), each of these funding mechanisms have limitations and challenges.

Grants: Organizations feel that many grants do not fit their organizational needs for operational support. Most grants found are project or program based, leaving out funding for imperative operational funds. This issue causes organizations to either not apply, thus drastically reducing funding options, or forces organizations to alter their course of work to fit within the limitations, compromising their missions. Stringent rules and burdensome processes around grant application and reporting requirements for operational support also hold back many organizations from applying for and receiving needed funding. Heritage leaders across the board said that more open-ended grant funding and less burdensome reporting would immensely help their funding needs to support operations.

Donations/Fundraising: Individual donations can be an excellent source of operational funding since it has fewer strings attached than grant funding, but donations are time-consuming and costly to attract. And in some cases, individual donations, particularly for large contributions, may include restrictions about how to spend the money, making it as inflexible as grant funds.

County Government Support: Another alternative funding option for operational costs is collaborating with county government on directing tourism taxes towards heritage organizations. It is even possible to create a special taxing district expressly to support heritage organizations. However, the process for acquiring tax or lottery funds involves many time-consuming steps and requires considerable political capital, such as complex campaigning and



From the Field...

"Funding for operating expense is the highest priority."

"Our building is showing its age (27+ years) and in need of expensive (HVAC) repairs, which is presenting a budget challenge, and a challenge to maintaining the correct environment for preservation."

"As a small town museum we struggle with finances to keep the doors open. High cost of heating and cooling and maintenance on our building is a challenge. Attendance is down and those that do visit don't contribute much. Fundraising opportunities are few and don't net enough funds to justify the event."

¹³ American Alliance of Museums, "Museum Board Leadership: A National Report", 2024. <https://www.aam-us.org/2024/04/23/2024-museum-board-leadership-a-national-report/>



lobbying. This is often impossible for most organizations due to the high level of staff capacity needed.

Membership/Admissions Fees:

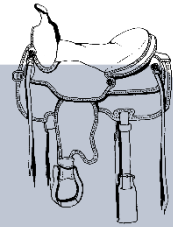
Organizations can choose to charge for their services, and many do. The public's willingness to pay for these services (by purchasing memberships or paying admissions fees) may be limited, however. Organizations face a difficult balancing act when setting a price that will both cover their operational needs and be affordable enough to attract patrons. Charging for services also excludes patrons with limited financial means.

From the Field...

"It is difficult to find financial support as an independent historian whose focus is more academic. There are a few grants available, but they are usually relatively small."

"The operational funding we have received for the past 31 years from [our county] is in question and has not been increased to cover cost of living increases for the last four years. Funding is being sought out from other sources but these competitive and limited."

"It's more about competing with critical needs. We keep getting told by potential donors 'We love what you are doing, but we are giving to "insert critical need here.'"



- 20% of survey respondents said that when they did not have enough money and delayed building and facilities maintenance as a cost-saving strategy (the most reported cost-cutting measure). Fifteen percent said they reduced business hours and marketing strategies (tied for the second most reported cost-cutting measure). (n=168)
- 58% of survey respondents felt that the top emerging concern for the heritage sector in the next five years was facilities maintenance and repair (the most reported emerging concern). This concern was echoed by interviewees and workshop participants. (n=228)
- Several heritage representatives interviewed discussed how donations from individuals and community members (who they often relied on for funding) had included expectations for how it would be spent that was not a priority for the organization, leaving unsolved funding issues for urgent needs.
- 45% of survey respondents noted that the top barrier to applying to grants was that available grant opportunities did not fit their organizational needs (the third most reported barrier). (n=150)

Issue 8: Making the Most of Digital Opportunities



Heritage organizations report a desire to use digital tools to preserve collections and increase access to collections and interpretation online. However, organizations face barriers including inadequate infrastructure, limited access to software and hardware, and lack of awareness and training for existing systems.



The rapid progression of new technological trends and insufficient funding for necessary tools create a steep learning curve for many heritage organizations. Although there has been slight improvement, the entire heritage sector is still trying to close the gap between their technological capabilities and the technology that is available.

A primary barrier to some organizations' progress is the lack of broadband in rural regions of Oregon. According to the 2023 Oregon Digital Equity Plan, just 24% of Oregon's population had access to a low-priced internet plan priced at less than \$60 per month, and only 57% of rural Oregon residents have access to 100/20 broadband.¹⁴ This lack of digital infrastructure hinders organizations' ability to engage with technology. There is little direct support available to organizations that experience this barrier—while many organizations across the state are working to address broadband issues, the solutions are often expensive and slow to materialize.

Organizations recognize the urgency of incorporating digital programming into operations, but often lack the expertise and support needed to make these changes. Individuals who struggle to adapt are feeling marginalized and left behind in the broader societal shift towards digitization and technology. As society embraces digitization, many heritage organizations are scrambling to catch up.

An example of new technological trends is the emergence of artificial intelligence (AI) as a tool for enhancing marketing operations. AI has made a polarizing appearance within the heritage sector. The organizations that have access to this technology reported increased efficiency and capacity to address other tasks. Conversely, other organizations express ethical concerns about AI's role – i.e., reducing the amount of human involvement in heritage work, issues involving plagiarism due to AI compiling data without permission from or compensation to its creators, and the massive energy use it depends on.¹⁵ Currently, there is no consensus on AI adoption, highlighting the ongoing debate over its role in heritage communication strategies.

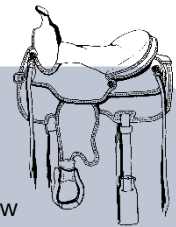
From the Field...

"The company that had our photo archives online crashed our site and couldn't fix it. Now we are back to square one and can't find a tech programmer."

"The main problem is keeping current the technology, most of the patrons love to read about the history of Oregon, they just want to read it on their e-reader not in a dusty book."

"Burnout is an issue with only one staff member dedicated to maintaining the collections, updating and adding to the digital archival database, assisting researchers, doing public outreach, and keeping abreast of changing technology."

"There is a growing demand for virtual access and experiences related to heritage and culture. I feel this is an issue that really came to light during the pandemic."



¹⁴ Business Oregon, "2023 Oregon Digital Equity Plan", 2023

¹⁵ Center for the Future of Museums, "TrendsWatch: Navigating a Volatile Future", 2024. <https://www.aam-us.org/programs/publications/trendswatch/>



The issue of preserving tangible heritage resources came up frequently in survey responses, interviews, and workshops. Heritage workers expressed concern over historic documents, photos, film, books, and other tangible and ephemeral objects, and one way to preserve these is digitization. Organizations also noted an increase in demand for digitization and online access to archives by the public and within the heritage sector. However, access to these services for organizations is limited due to technological and funding constraints, as well as staff capacity and person power to carry out the scope of work for digitization projects.

- In an online interview, the interviewee stated the broadband in their respective area was inadequate. The participant disconnected 4 times throughout the course of the interview due to their unreliable internet connection.
- Many interview participants cited technology as a notable weakness to their programming due to a lack of digital literacy among staff/volunteers.
- An interview participant reported financial support dedicated for technology was a much larger issue than digital literacy.
- 41% of survey respondents felt that the cultural resources in the most peril were historic photos, film, documents, and rare book collections, the top answer chosen. (n=227) These resources would benefit from digital preservation.
- 53% of survey respondents said there was an increase in demand for online queries or requests from the public, 46% said there was an increase in demand for background research and records, 42% said there was an increase in requests for copies/scanned documents, and photographs, 42% said there was an increase in demand for digital collections, and 41% said there was an increase in demand for archive usage. (n=216)
- 46% of survey respondents indicated that technical support and professional training opportunities would have been the most useful support from the state, demonstrating that many organizations are eager to increase their skills (the third most reported choice option). (n=196)
- Workshop representatives expressed openness to AI integration in daily tasks – e.g., social media posts, job descriptions, etc.

Issue 9: Connecting to Communities



Heritage organizations aim to broaden community engagement, and recognize its importance in gaining support, demonstrating relevance, and enhancing organizational capacity. Organizations particularly focus on youth engagement, a term broadly defined to include individuals from school-age children to those in their middle-ages (anywhere from 30 to 50, depending on the age group of the organization's staff and their comfort levels with various younger age groups). More work needs to be done engaging youth, other generations, and diverse communities.



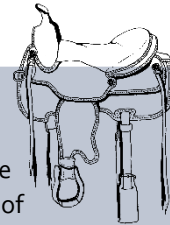
There is a disconnect between what organizations are sharing through their programming and what audiences want to see. Many organizations in workshops shared frustrations that the public simply doesn't care about heritage, but many organizations also don't seek public opinion about what would make the public more eager to interact. This leads to programming that may not feel relevant across generations and cultures; many community members simply don't see themselves and their stories reflected in programming.

As calls for inclusivity and better acknowledgement of historic racism, sexism, and homophobia grow, some heritage organizations are not able to keep up. Oftentimes organizations do want to engage in new, inclusive, and intentional programming, but due to staff capacity and/or funding constraints, cannot begin the steps to do so. Bridging this gap between organizations and the public is key for heritage organizations to connect more meaningfully and successfully with their communities.

Heritage organizations also struggle to engage youth through the K-12 curriculum. There is a lack of awareness in the heritage sector about what youth are being taught in schools about heritage. Many heritage organizations also expressed difficulty in reaching school-aged children and teens through the education system, which can feel challenging to navigate. At the same time, heritage organizations are eager to provide foundational knowledge to youth about the value of heritage and opportunities for careers in heritage. Finding connections and partners in K-12 education to understand curriculum and what role heritage can play within it is imperative to engage youth and promote the value of heritage during these formative educational experiences.

Beyond K-12 education, heritage organizations also expressed challenges interacting with the higher education system. As young adults learn more about the world, the opportunity is ripe to increase their excitement about and engagement with heritage. Heritage organizations need help connecting with relevant degree programs to find interns and raise awareness about the importance of heritage.

Heritage organization can also have a fruitful role in passive education opportunities. They can serve needs of diverse communities through a variety of services accessible outside of the



From the Field...

"Over the last several years we are seeing a reduction in the number of volunteers who are interested in heritage preservation. In general, many of our volunteers are at an age where they are limited physically and there doesn't seem to be younger people interested."

"[A top current concern is] difficulty in finding people who are interested in the preservation of our history, so that we may pass that history onto the next generation."

"Finding new volunteers willing to become greeters and/or take an active role in the museum is one of our biggest issues. Our volunteer base is aging and we must get younger folks involved but try as we might...it is very difficult."

"Museum board members, and sometimes staff members, are too often focused on continuing outdated programs and traditions, and are sometimes resistant to changes that will help our institutions remain relevant to younger generations."

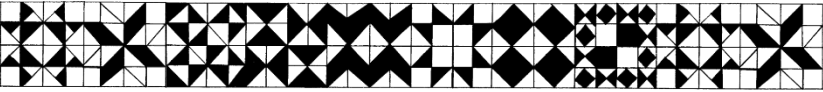


formal education settings. Finding these settings and matching organizations with them is an imperative step to engaging communities with heritage in the state.

- 44% of survey respondents listed keeping heritage and cultural organizations viable and relevant (the most reported current concern). (n=232)
- 70% of all organization respondents are undergoing program initiatives involving educating the public about heritage-related topics. (n=195)
- Workshop representatives expressed concern over the generational disconnect between younger generations and elder leadership as many current outreach methods do not reflect the current interest of younger demographics.
- The Southern Oregon Historical Society connected youth to local history through a comic-making contest at the Medford Comicon, by providing youth with local historic stories to make into comic strips.
- 55% of museums included links to other resources on their respective websites. (n=138)



4. The Path Forward



This section details recommendations to alleviate heritage sector issues based on survey responses, interviews, workshop conversations, advisory committee meetings, and conversations with Oregon Heritage staff. Recommendations include tasks for state-level actors and statewide heritage or heritage-related individuals, as well as tasks for individual organizations to pursue. This is to ensure shared responsibility on all levels, an important condition for creating tangible and noticeable change.

Each recommendation first shares broad, overarching ideas about the purpose and approach to the recommendation, followed by more detailed bullets explaining a few processes that could help carry out the recommendation. There are occasional examples that highlight specific steps towards issue alleviation, but in general recommendations are kept broad to allow for interpretation and flexibility as partners seek to carry them out.

Each recommendation then moves to share how heritage organizations can work towards alleviating current sector conditions by taking grassroots approaches. Although lack of capacity and funding make it difficult for organizations to engage in strategic work and collaborations, organizations themselves are the closest to the work that they do, understand it the best, and can follow small steps that will alleviate the stressors they are facing. Instead of adding more work, these local solutions involve changing priorities and lowering barriers to ensure success and accessibility.

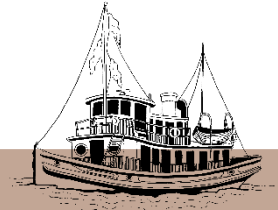
Though categorized, all recommendations interact and depend on each other, just as the issues described in this report are interrelated. The first recommendation, creation of a taskforce or workgroup, broadly encompasses elements of the recommendations that follow it. It calls for a group of heritage experts to begin important conversations about how change can and should happen. Clear expectations and direction resulting from this group's conversations will help make the subsequent recommendations more actionable and realistic.

Although it is likely all recommendations can move forward in tandem eventually, the taskforce or workgroup should have a year or two of initial conversations and direction-setting to lay the groundwork for the subsequent recommendations. The content of subsequent recommendations can serve as resources as they consider how movement in the sector should happen; the taskforce or work group may consider updating the text of these recommendations as they engage in exploratory conversations.

The overall hope is that these recommendations will create a healthier foundation for the heritage sector and help heritage organizations build a future that focuses less on survival and more on preserving and sharing heritage.



1. Taskforce/Workgroup



To address many of the issues that heritage organizations are facing, a coordinated, cross-sector response would be immensely beneficial. One way to do this is to gather opinions and perspectives from the most experienced and knowledgeable voices in the field and related fields into a taskforce or workgroup. Such a body would create a deliberate and meaningful space for important discussions about how to alleviate issues. Regular meetings and decision-making through this group will help explore issues and their recommendations further, and members can help garner momentum for changemaking through their knowledge and connections.

This recommendation is based on precedence from the 2010 Heritage Vitality Study, which established a legislative taskforce that successfully moved work forward and created meaningful impact within the heritage sector. Expanding on this success will allow for more meaningful work to be done under clear guidelines and directed responsibility. This new group could also be created by the legislature or called together by an interested committee or interest group to ensure the creation process is fair, the goals are known, and the members are representative of the sector and state.

Listed below are the various roles the taskforce or workgroup could play, to provide greater clarity of direction for the subsequent recommendations included in this report:

1.1. Collective Case-Making: Discuss and determine the best ways for the sector to talk about the value of heritage.

- Meet to discuss value of heritage communication and how organizations can relay it to those outside of heritage world.
- Establish partnerships by recommending and proposing specific collaborations amongst organizations to move forward a coordinated effort on affirming and promoting the value of heritage.
- Have conversations about shared language, messaging, and communication between agencies and service providers both within and outside of heritage (i.e. culture, arts, and tourism sectors), to promote collaboration and a joint mission to share with state government, taxpayers, and community members.
- Recommend next steps to move coordinated efforts forward.

1.2. Internal Coordination around Service-Provision: Explore how to collectively align work across the sector and create more regional support.

- Investigate and provide recommendations on sharing resources such as consolidation of organizations, shared staff, associations providing insurance coverage, shared collection management system, etc.
- Discuss new models for increasing technical assistance, and how it could be funded on an ongoing basis.



- Work with organizations to explore ways to coordinate and promote regional partnerships and collaborations such as shared staffing models; gather models and examples for this work.

1.3. Funding: Explore mechanisms to increase the accessibility of grants, both those controlled by the State and those controlled by other funders. Discuss steps to ease the burden on organizations, including:

- Streamlining and/or standardization of grant applications.
- Scaling application requirements to size of award.
- Scaling reporting requirements to award amount.
- Longer term funding for majority of grants (preference is around 3-5 years).
- The best ways to engage funders in the conversation of grant accessibility, and what support the taskforce/workgroup, State, and organizations could provide in this process.
- How operational funding options can be increased and made more accessible.

Taskforce/Workgroup Composition

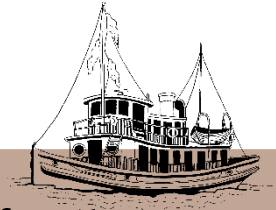
The taskforce or workgroup would ideally include a diverse group of both heritage leaders and individuals from adjacent, relevant fields. Members should have experience in all corners of the sector and its periphery to ensure perspectives both accurately represent heritage organizations and give helpful context to how heritage relates to neighboring sectors. **Some key parameters for assembling a diverse group include representation from:**

- | | |
|-----------------------------------|---|
| - Urban and rural areas | - Legislators |
| - Small and large organizations | - The Governor's office |
| - Tribes | - Identity-based organizations |
| - State cultural agencies | - Members with marketing and communications backgrounds |
| - Foundations | - Any other appropriate representatives |
| - Nonprofit Association of Oregon | |
| - Travel Oregon | |

The specific role of the group would be broad, encompassing several of the issues found and recommendations created. The group could have policy-level conversations to help determine how to alleviate the current and emerging issues in the heritage sector.



2. Communicating About Resources



A multitude of resources already exist to help with professional development, nonprofit management, fundraising, and even heritage-specific technical needs. Despite this, many organizations continue to request assistance in these areas, and are often surprised to learn about the existence of these resources. This points to a disconnect in communication: the efforts of technical assistance providers to meet organizations' needs are not translating effectively to organizations.

Many small, capacity-strapped organizations are overwhelmed by the amount of communication they receive and can't sort through everything to find what's most useful to them. Others with limited internet access and less comfort in digital spaces struggle to access increasingly online resources. Finally, many organizations overlook useful resources because the resource is not geared specifically to their operations (e.g. museum or historical society), forgetting that resources for nonprofits or small businesses in general can be incredibly useful. Recommended methods to increase engagement with existing resources are listed below:

2.1 Adapt existing resources to promote accessibility and create more universality within their content to allow for higher usage across the sector.

- Investigate the format, distribution, and communication preferences of organizations to ensure resources are easily accessed by at- or over-capacity organizations.
- Normalize the vocabulary used within resources so organizations can find common ground in the resources content, even if it doesn't explicitly call out their type of work.

2.2. Explore the development of a centralized hub of information or other creative and scalable solutions that streamline access to resources.

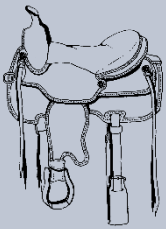
- Explore how to consolidate or better coordinate resource-sharing from technical assistance providers to decrease the amount of communications received by heritage organizations.
- Based on the format preferences expressed by organizations, develop alternate and accessible communication forms, particularly for those who are not online.
- Facilitate and encourage the continued promotion of existing resources through Oregon Heritage and other technical assistance providers.
- Promote the idea that resources don't have to be specific to an organization's mission or focus – a multitude of resources can be helpful regardless of granular detail.

2.3. Discuss new ways that networking and peer-to-peer technical assistance can enhance heritage organizations.



- Gather information on existing networking and technical assistance support systems to decide if what already exists is sufficient, what could be changed, and what could be created.
- Discuss how regional and topical-specific support could be beneficial to organizations, and if so, how this would be established and distributed.
- Discuss and explore new opportunities for the Mentor Corps program based on existing feedback from participants and volunteers.
- Utilize existing networking groups, particularly established regional coalitions, to distribute information, encourage the formation of regional networks in areas that don't already have one, and provide support materials on how to do this.

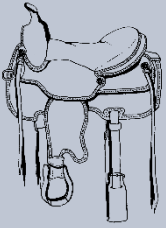
Organization Level Action



- Connect locally with other Oregon heritage organizations, or focus regionally, to create stronger bonds and learn what has been effective from other similar organizations.
 - Tap into existing networking opportunities statewide, regionally, and locally.
 - Reach out to nearby organizations (search online to find organizations with common missions, operations, or goals) and explore collaboration and mutual support.
- Reach out to other organizations in your region with any shared values, mission, role, or needs to share ideas and ask for tips.
- Explore resources from statewide technical assistance providers, like associations and Oregon Heritage, even if they do not specifically relate to your organization's activities – there can still be good information about nonprofit and board management, funding, operations, and more in resources that are for a different type of organization.
- Sign up for and read the Oregon Heritage News email. It sorts from state, regional, and national resources for many topics and resources. This task can be assigned to a specific staff, volunteer, or board member and they can share and report to the group.
- Sign up for and read the Oregon Heritage Exchange blog which includes examples and resources of heritage work around the state. This task can be assigned to a specific staff, volunteer, or board member and they can share and report to the group.
- Submit an article for the Oregon Heritage Exchange blog to share your lessons learned and experience.
- Set up an informal lunch gathering with other heritage, tourism, and cultural nonprofits in your community to connect, commiserate, and learn.
- Many organizations offer free or low-cost trainings, many online or local. Commit to sending staff, volunteers, or board members to one per quarter.

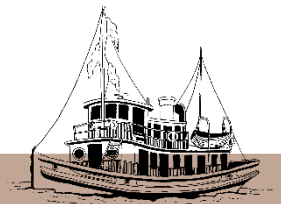


Organization Level Action, Cont.



- Send an organization representative to the Oregon Heritage Conference, offered the spring of even years.
- Include trainings, resource development, and networking in staff and volunteer job descriptions and account for this time in work priority setting.
- If you are part of a regional network, contact the Oregon Heritage Commission to make sure they know about it and ask for a staff member or Commissioner to speak to the group about programs and opportunities.
- Reach out to state-level entities like Oregon Heritage, Oregon Museums Association, Restore Oregon, and the Oregon Cultural Trust to learn about existing regional networks you can plug into.
 - If a local network does not exist, consider starting one!

3. Promoting the Value of Heritage



Heritage organizations have a dual challenge to convey the value of heritage on a community level and a legislative level. The efficacy of communication impacts funding, staffing, and programming. Despite the existence of reports detailing the positive impacts of heritage, organizations have difficulty promoting their value as economic and social contributors in their communities.

Organizations should focus on articulating value on a statewide level to improve public perception and the visibility of impact reports to elected officials and funders. Representing data and stories that articulate Oregon heritage organizations' impact will help organizations represent themselves to a wide array of audiences, from federal funding agencies to local patrons. Recommended methods to better articulate the value of heritage with new and existing resources are listed below:

3.1. Develop a statewide marketing campaign to promote the existence and value of heritage resources and organizations.

- Explore heritage as a part of the solution for critical needs and not a competitor with critical needs.
- Explore new and promote existing social media and online platforms as a broadcasting tool. For example:
 - Oregon Historical Society Wayfinder
 - Oregon Time Web



- Northwest Digital Heritage
 - Travel Oregon's Culture and History page
 - Oregon Folklife Network Culture Keepers Roster
 - Deschutes County Story Map
- Repackage and consolidate existing reports on the economic impact of different aspects of the heritage sector into a digestible format (e.g., PowerPoint slides, one pager, etc.).

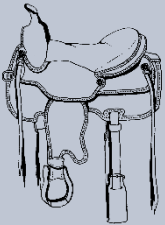
3.2. Fund the State Library of Oregon to expand and promote Northwest Digital Heritage.

- Seek sustainable funding to make digitizing collections more accessible.
- Investigate digital and online user interfaces to increase public awareness of Oregon Heritage organizations and resources.

3.3. Aggregate existing heritage tourism studies to understand the economic value of heritage in that industry and identify any missing information.

- Collaboration with Travel Oregon to analyze heritage data.
- Conduct regional-focused tourism studies to provide localized data where such data does not currently exist.

Organization Level Action



- Coordinate with other heritage organizations to develop a presentation about your work and give that presentation to City Councils/County Commissions.
- Share tourism, impact, and financial data across organizations to aggregate information and demonstrate value in your region and type of work.
- Use the Economic Impacts and Value of Oregon's Heritage Organizations and Events Report and its communications tool to calculate the regional impact of heritage, and team up with other heritage organizations in your region to promote that economic value.
- Use the value of heritage reports and communication tools on the Oregon Heritage website for case-making in grant applications.
- Meet with your county disaster preparedness organization and share the Value of Heritage in Disaster Resilience report.
- If you are a Main Street organization, share the Impact of Oregon's Main Streets Report and the annual report.
- Coordinate with other organizations for commemorations: Black History Month, Historic Preservation Month, Women's History Month, etc.



4. Increasing Funding Options



Heritage organizations are looking for creative solutions to help bolster their funding and financial stability. They are looking for more accessible and longer-term funding to help them focus on their organization's programs and other operations. New funding may need to be solicited from state-generated sources. Better articulating the value of heritage will assist in advocating for the creation or diversion of funds to heritage organizations.

The funding solutions recommended here focus mainly on State-led initiatives to expand funding sources and grant accessibility initiatives, but there are also ideas for how individual organizations can more successfully approach fundraising.

4.1. Identify new funding streams to expand grant and funding options for organizations.

- Create a heritage-specific operational support grant to assist with ongoing staffing and overhead expenses.
- Designate Travel Oregon funding specifically for heritage tourism.
- Investigate license plates as a heritage funding stream.

4.2. Identify or develop funding assistance for building maintenance and repair.

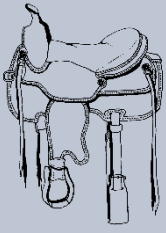
- Create a grant for the preservation of privately owned historic properties.
- Increase access of heritage organizations to the Cultural Resource Economic Fund (CREF) Program.
- Explore the creation of a tax credit program for commercial properties as a form of assistance for building and maintenance needs.

4.3. Increase grant application assistance.

- Coordinate group application writing sessions for grants to encourage collaboration and skill sharing.
- Increase promotion of application support resources.
- Target regions and organizations to increase application submissions and diversity.
- Continue collaborative outreach like the Oregon Cultural Trust Conversations with Funders.

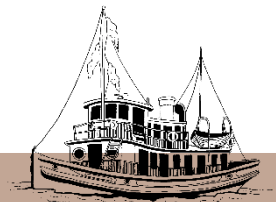


Organization Level Action



- Participate in trainings and orientations offered for grant and other funding programs.
- Use instructions and orientation tools provided by the funder.
- Don't give up: ask for advice from the funder if you are confused or getting stuck; they are available to assist with applications.
- Apply to programs that fit with your mission and your project.
- Don't create a project just because funding is available. Develop plans that will directly further your mission and then seek funding.
- Seek collaborations to apply for more competitive or higher levels of funding that your organization could not manage on its own.
- Communicate to local/regional/state decision-makers about funding challenges. Utilize resources that provide data and messaging to build awareness of needs.

5. Fostering Community Connections



Heritage organizations should aim to broaden community engagement by focusing on new ways to reach the public, particularly children, younger generations, and historically marginalized communities. Organizations should first investigate existing public perceptions of heritage and then identify the wants and needs of community members, particularly those who do not currently connect much with the heritage offerings. Understanding how these folks prefer to get involved and what excites them is vital for effective engagement.

There are many opportunities for organizations to explore the best ways to garner interest from youth or groups not currently involved in heritage. Listed below are ways the heritage sector could explore engagement with new audiences while retaining current audiences:

5.1. Research local public perceptions of historic places and preservation to allow Oregonians to share heritage interests and overall preferences for getting involved.

- Encourage collaboration amongst organizations across the state to collect information about their communities' perceptions. This will help reach the most people and gather adequate regional representation.
- Find or develop guidance to assist organizations with building and distributing perception surveys to encourage ongoing updates of preference information.



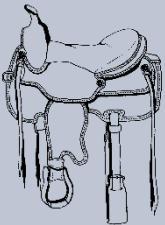
5.2. Focus on connecting with youth through educational opportunities.

- Investigate how heritage is currently incorporated into the K-12 education system and how it might be added to the curriculum in reasonable and beneficial ways.
 - Work with those in charge of education to understand the current curriculum, then consider advocating for changes if what exists does not adequately connect youth to heritage.
 - Connect with administrators, mentors, teachers, and caregivers to investigate additional ways to connect children and teens to heritage education.
 - Ensure school districts know about the State of Oregon Ethnic Studies Standards, Tribal History - Shared History concepts, and Holocaust and genocide studies. Connect school districts that do not with the curricula and resources available to teach these topics.
- Investigate how youth engagement in heritage can happen directly through organizations (outside of schools).
 - Consolidate information about what direct programming already exists and its impact on children and young adults.
 - Use this information to develop a “value of heritage in informal learning” report and communication tool.
- Assist higher education programs with shaping their curriculum to better align with the professional skillsets needed by heritage organizations.

5.3. Facilitate conversations about changing collections and interpretive themes to engage existing and new participants.

- Host workshops to help heritage organizations dialogue about how to increase the inclusivity of their programming.
- Identify organizations that represent community members who aren’t currently engaged with heritage organizations. Connect heritage organizations to these groups.
 - Develop a guide or toolkit for how to connect with such organizations.

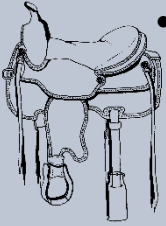
Organization Level Action



- Show up for and support community events and other organizations. Ask staff, board and volunteers to wear your organization’s name badges or t-shirt when they do.
- Ensure opportunities to get involved are accessible and welcoming to all – examples include board meeting times that are mindful of various working schedules, remote volunteer opportunities, and open-mindedness on volunteers trying new things.
- Attend local gatherings of organizations like Chamber of Commerce, etc.



Organization Level Action, Cont.



- Connect with organizations that represent people in the community who aren't currently engaged with heritage organizations:
 - Involve these organizations in the development of programming to ensure it meets the needs/desires of the groups they represent.
 - Participate in these organizations' programming to develop relationships and understand how to better serve the groups they represent.
- Implement changes that will make heritage professions more accessible:
 - Scan your organization for barriers to entering the field, such as overly restrictive degree requirements, and make changes to make jobs more accessible.
 - Engage in more expansive recruitment techniques and operations that will reach more folks interested in heritage careers, particularly those from diverse backgrounds.
 - Focus on recruiting from the community, even if it will require more on-the-job training; local folks often have a particularly strong investment in their community.
 - Advocate for more affordable workforce housing, support solutions for housing shortages.
 - Pay appropriate wages that ensure employees can afford housing and cost of living in your area.
- Engage with youth and educators:
 - Encourage educators to share purpose, meaning, and impact behind heritage careers.
 - Work with schools on speakers/presentations from heritage professionals that demonstrate identity-diversity in heritage so students can see themselves in heritage professionals.
 - Find ways to relate heritage to youth interests, particularly within your community. A good example of this is the Southern Oregon Historical Society tabling at the Medford Comicon, creating a contest for youth to draw a comic using a local historic event as a prompt for their art.
 - Invite teachers, school board members, home school organizations, camp providers, youth clubs, churches, etc. to exhibits and events.



6. Addressing Facilities and Operations Needs



Organizations struggle with having the capacity to maintain operations and upkeep of facilities. Operational concerns include management, communications, and staffing. Physical concerns include the structural, seismic, accessibility, and operational functions of buildings, facilities, structures, and grounds. Organizations want to ensure the safety and security of heritage's physical presence in Oregon, and that anyone can access structures and other resources, regardless of their physical abilities. At the same time, organizations want adequate staff and volunteers who are well-trained and capable of supporting the organization's operations and physical needs.

The barriers for organizations to address their facilities, maintenance, and organizational concerns are best met with financial support and resource sharing from across heritage organizations. Recommended methods to improve facilities maintenance and operational shortcomings are listed below:

6.1. Increase existing and source new and different forms of financial assistance that will:

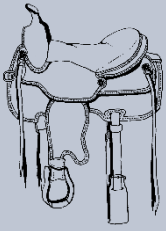
- Fund (perhaps through a grant) historic building repair, restoration, and upkeep. Needs include funding for:
 - Assessment, facilities planning, architectural work, and labor.
 - Seismic, roof, and foundational retrofits.
 - Properties that contain historic collections, but aren't necessarily historic buildings.
- Establish funding for staff support, strategic planning, and staff and volunteer training.
 - Ensure organizations have funding that covers these basic operational needs to increase capacity and knowledge amongst staff.

6.2. Facilitate resource sharing across organizations:

- Facilitate a shared staff, joint project model, and/or expansion of mentoring programs for facilities management to help:
 - Coordinate bids across multiple organizations, especially rural organizations.
 - Lower costs of labor and materials by collating projects.
 - Expedite construction timelines and maintain ongoing relationships with construction contractors.
 - Share ideas, tips, and tricks between more and less experienced organizations.
- Encourage coordination and resource-sharing between organizations to:
 - Allow for the joint funding and utilization of necessary digital tools across organizations to lower costs and increase accessibility.
 - Create or reimagine channels of communication.
 - Share experiences, tips and tricks, and contacts for construction/ renovation/ maintenance companies that are well suited to the heritage sector.
 - Create transparency around insurance costs so other organizations have a better sense of available pricing.



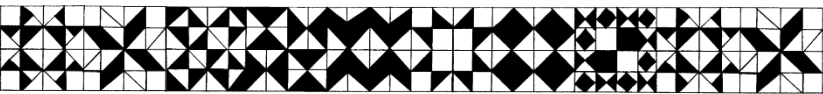
Organization Level Action



- Attempt to prioritize basic operational needs and capacity building to develop a stronger foundation and structure, and help ensure organizational longevity.
 - Explore available resources to create strategic plans, volunteer manuals, emergency plans, succession plans, and other imperative documents.
 - Redirect and reprioritize goals to be long-term rather than short-term.
 - Cultivate membership systems for volunteer and financial support.
 - Prioritize care and support for staff and volunteers to manage stress due to change and overload.
- Hold strategic plan/emergency plan/mission & vision statement making trainings/workshops with boards.
- Include building and maintenance plans as part of your strategic plans.
- Compile lessons learned from similar organizations:
 - What types of building concerns are a priority
 - Suggested timelines and orders of operations for repairs and maintenance
- Share the cost of facilities with your supporters and membership. For example, HVAC maintenance and operation supports collections care, but is not a collections care line item.
- Include facilities in your fundraising campaigns.
- Give facilities tours to supporters: help them go “behind the scenes” and demonstrate the need.
- Prioritize time and budget for staff and volunteer training and support, addressing changing collections and interpretive themes and practices, and implementation of digital tools.



Appendix A: 2010 Issues Status



This appendix examines the evolution of the 2010 issues. This checkpoint into the state of the sector 14 years ago allows us to demonstrate some of the changes that have occurred since then. The 2010 study came at an important point in United States history, where the country was still recovering from the detrimental 2008 Great Recession, and many individuals, organizations, and institutions were still financially reeling. Government entities and communities were parsimonious with state money, resulting in the loss of state funds for many organizations. Along with this, the tech industry was growing exponentially, permeating more and more into daily lives and professions. This both created new opportunities for heritage organizations to share and archive their work, but also over time has created a disconnect between some organizations and a fast-paced digital atmosphere.

We see many traces of this financial and social atmosphere within the 2010 report issues, and the subsequent recommendations. The 2010 report narrowed recommendations into four main goals that have each resulted in impacts on the heritage sector. While significant changes have been made due to individual, local, and state support to the sector, many similar barriers that still remain, demonstrating the deep-rooted nature of many of these issues.

2010 Recommendations and Resulting Changes

1. **Request that the 2011 legislator appoint an interim task force to examine state and county financial support for Oregon heritage organizations and to develop solutions to the challenges.**

In 2012, the interim task force published the "Report of the Legislative Task Force on Oregon Heritage Vitality," bringing their findings before the 76th Oregon Legislative Assembly. They called for an increase in public and private funding to safeguard Oregon's "remarkable history and heritage."

2. **Determine the economic and cultural value of heritage to Oregon including its direct and secondary impacts.**

This directive resulted in a 2022 report by ECONorthwest called "Economic Impacts and Value of Oregon's Heritage Organizations and Events."¹⁶ This report details how Oregon Heritage organizations value, benefit, and contribute to Oregon and local economies.

¹⁶ ECONorthwest. "Economic Impacts and Value of Oregon's Heritage Organizations and Events," 2022.



3. **Strategically communicate consistent information about the value and importance of heritage to the economy and daily lives of Oregonians.**

Oregon Heritage expanded their ability to share stories related to the value of heritage by creating the Oregon Heritage Exchange Blog, the Sharing the Value of Heritage tool, and by sharing resources and opportunities in the weekly Oregon Heritage News, an e-newsletter.

4. **Increase the capacity of heritage organizations and businesses to collaboratively expand their leadership, development, preservation, community building, communications, educational offerings, and technology.**

The Oregon Heritage MentorCorps program is a direct result of this recommendation. The program offers peer-to-peer support for heritage best practices, nonprofit resources and training, as well as emergency management assistance.

2010 Issues Status Update

As with the recommendations in the 2010 Vitality Study, efforts to support the heritage sector over the past 14 years have impacted the status of the issues presented in the 2010 report. The following sections offer commentary on where the sector stood in 2010 and what has changed since then.

1. Funding Scarcity

The issue's status has improved, but barriers remain.

In 2010, the status of funding within the Oregon heritage sector was fluctuating and unstable. Several tax designations for the heritage sector created in the 1990s had recently been lost, and organizations were becoming more and more dependent on grants, admission fees, memberships, and other private funds. These private funding streams were limited and meeting only a fraction of the needs of heritage organizations.

2010 Issue: Funding Scarcity – Insufficient financial support from government and private entities negatively impacts heritage institutions' ability to fulfill their roles in a community. The lack of sustainable funding causes an increase in competition between organizations when applying for financial aid.

In response to these funding challenges, the State of Oregon published an official report in 2017 "National Survey of Heritage Funding and Incentive Programs: Opportunities for Oregon." This report offered organizations programs to implement with the assistance of local government to secure more funding. Oregon has also received steadily increasing amounts of funding every fiscal year from the Historic Preservation Fund (see Table 6). The implementation of programs that create low-income housing, job opportunities, Certified Local Governments (CLG), etc. may justify the funding increases over the years.

Today, 76% of survey respondents report a consistent or improving financial outlook.



Historic Preservation Fund Allotments to Oregon

	2018	2019	2020	2021	2022	2023
Oregon	\$903,609	\$917,972	\$975,417	\$1,032,863	\$1,071,159	\$1,161,729

Source: National Park Service

Despite this, organizations noted in survey responses and interview/workshop conversations that funding was still a large barrier to their success, particularly in paying the wages and salaries needed for an adequate workforce. Half of survey respondents feel that funding is a top current concern for the heritage sector, and 39%, the most frequent response to the question, think that more funding would have the greatest impact on their organization's ability to carry out their mission. This shows there is still much work to be done to ensure Oregon heritage organizations have what they need to thrive.

2. Inter-Organizational Collaboration

The issue's status has improved but still requires work.

Since the publication of the 2010 Oregon Heritage Vitality Report, collaboration seems to be improving in certain aspects but remains an ongoing challenge requiring meaningful effort to continue. In 2010, heritage organizations were still recovering from the aftermath of the economic recession and experiencing significant budget constraints. Consequently, responding to the recession and adjusting internal management took priority over outward coordination and collaboration. While collaboration among organizations existed during this time, it was not widespread – many organizations refrained from participating in any collaborative partnerships.

2010 Issue: Inter-Organizational Collaboration – Inadequate collaboration among heritage organizations and their respective communities is apparent. There are various obstacles that interfere with the development of successful collaborations. Such obstacles include a lack of resources, coordination, and leadership.

The 2010 Vitality Report indicated a notable lack of online coordination between organizations. Looking ahead to 2024, there are more organizations engaging in collaborations – online collaborations in particular. However, there are still more under-explored opportunities for collaborations to provide better benefits to heritage organizations. Feedback from the survey, interviews, and workshops indicates the COVID-19 pandemic set back active and meaningful collaborative efforts.



3. Quantifying Value

The issue's status has improved significantly but still requires work.

The issue of quantifying value is defined as the inability to express the significance of heritage from economic and societal perspective. The ability to convey the value of heritage impacts all heritage activities. Without a clear value proposition to Oregon residents, organizations struggle to secure funding and engage community members.

2010 Issue: Quantifying Value – The inability to quantify and express the economic significance of Oregon's heritage sector negatively impacts organizations' ability to secure the necessary funding. While heritage organizations do hold value in concept, the available data does not reflect this contribution to a wider audience.

In 2010, quantifying value mainly focused on the lack of research available to accurately reflect the positive economic impacts of heritage on the larger economy. In response, several economic impact reports have been published to illuminate the value and economic contributions of heritage. For example, a report titled "Economic Impacts and Value of Oregon's Heritage Organizations and Events" was published in 2022 by ECONorthwest in collaboration with Oregon Heritage.¹⁷ This report includes the contributions of heritage organizations as driving factors stimulating other parts of the local economy. Another example is the report "Museums as Economic Engines" published in 2017, which demonstrates the economic contribution of museums on the larger US economy.¹⁸ Currently, there is more accessible data that reflects the economic importance of museums and other heritage organizations than in 2010.

Despite the increased accessibility of data, challenges of communicating the value proposition remain within the heritage sector. Numerous interview and workshop participants cited the difficulty of articulating value propositions as a persisting theme within the heritage sector today. Although large-scale economic reports do exist, heritage organizations perceived minimal impacts on their individual operations.

4. Leaving Heritage Education Behind

The issue's status has improved slightly, but significant barriers remain.

Since 2010, there have been more internships and mentorship opportunities. Twelve internship opportunities from the University of Oregon Preservation Program and six from the Oregon State University Archaeology program have emerged since 2010. The internships/ mentorships are aimed at students in higher education –

2010 Issue: Leaving Education Behind – Shifting educational standards have diminished the time allocated to teaching topics of history, heritage, and culture at the primary, secondary, and higher levels of education.

¹⁷ ECONorthwest. "Economic Impacts and Value of Oregon's Heritage Organizations and Events," 2022.

¹⁸ OxFord Economics. "Museums as Economic Engine," 2017.



college/university. There is no documentation signifying a notable improvement of the status of heritage education in the K-12 education system.

5. Lack of Skilled Workers

The issue's status has improved, but barriers remain.

In 2014, the launch of the MentorCorps Program established connections between trained volunteers and heritage organizations – focusing on areas like collections care, disaster preparedness, and adult education. Other programs were implemented to train individuals in specialized fields – e.g., the Clatsop

Community College Preservation program

specializes in stained glass repair, cemetery marker repair, and building restoration.

Additionally, the partnership between the Heritage Commission and the Oregon Cultural Trust has led to tourism workshops across Oregon. However, organizations continue to request these and similar resources. This demonstrates that, despite best efforts to address staffing issues, a disconnect between organizations and new resources remain. Many, if not all, of the issues detailed in the 2010 Oregon Heritage Vitality Report related to staffing remain.

2010 Issue: Lack of Skilled Workers –

There is a lack of individuals possessing the necessary skills and knowledge to tackle internal operations – i.e., preservation, fundraising, leadership, and technology. Many heritage organizations in Oregon lack the staffing expertise necessary to effectively resolve their issues.

6. Declining Connection to Oregon's History

The issue's status has improved, but barriers remain.

Recognizing the need to embrace different demographic groups for the audience and staff/volunteer pool for Oregon heritage organizations, some shifts have occurred since 2010. New internship/mentorship programs target young adults and young professionals. Other events in the state emphasize networking – e.g., Portland State University's Archaeology

Roadshow and the Oregon Archaeology Celebration. In collaboration with the State Advisory

Committee on Historic Preservation (SACHP), the heritage sector is actively seeking input from youth, the public, and other preservation partners to develop state-wide projects to enhance the demographic representation in the state inventory and National Register of Historic Places. Organizations have expressed interest in diversifying historic narratives to appeal to new audiences and enhance historic representation. Despite many organizations' hopes for expanding their audience, organizations still report that they struggle to connect to diverse demographics.

2010 Issue: Declining Connection to Oregon History –

Shifting demographics and ever-changing expectations pose a significant challenge to heritage. Establishing a connection between the state's heritage with incoming residents and younger Oregon demographics is an ongoing challenge.



7. Limited Modern Communication Strategies

The issue's status has many new facets and still requires work.

In 2010, heritage organizations were struggling to create online programming such as digitized archives and websites. Despite the increase in online presence and accessibility evident in 2024, online engagement tools continue to become more complex. Heritage organizations struggle to keep pace with advancing digital trends.

Emerging challenges such as tensions over narratives in programming were not present in the 2010 Vitality Report. The heritage sector has adopted more political narratives over the past decade as diversity, equity, and inclusion appear in cultural discussions. Organizations are feeling pressure to innovate their storytelling programs, and funding has begun to follow this shift as well.

2010 Issue: Limited Modern Communication Strategies – There is a limited amount of 21st-century communication and state-wide advocacy strategies employed by organizations. The absence of a unified message regarding the significance of Oregon heritage has negatively affected potential connections with local communities.

8. Relationship to Technology

The issue's status has slightly improved, but not all organizations experience consistent results.

Since 2010, there have been several technological improvements within the heritage sector. For example, Oregon Heritage launched an accessible online toolkit with resources including reports, partnerships, and long-term heritage plans. There is also a directory for heritage organizations with an emphasis on digitization. Digitization efforts are supported via grants and trainings – e.g., the Oregon Nikkei Endowment utilizing an Oregon Museum Grant to digitize material related to Japanese American history.

Current efforts are directed at assisting organizations, rectifying current errors in existing records, and developing a user-friendly tool for future cultural resources. The Oregon Heritage division's newly restructured website includes the Oregon Heritage Exchange, which provides technical assistance to members of the heritage community. Additionally, the launch of the Oregon Archaeological Records Remote Access (OARRA) system provides online access to Oregon Heritage's database of archaeological records. Individual efforts are being made on an organizational level as well. According to survey results, 37% of respondents plan on launching new online platforms to communicate upcoming projects to the public.

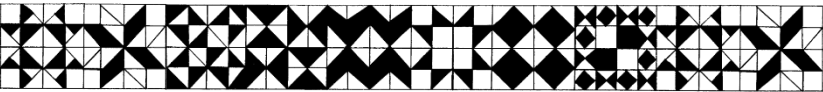
2010 Issue: Relationship to Technology – There is an inconsistent utilization of technology within the heritage sector. Despite shifting towards incorporating more technological advancements, there is a steep learning curve when adapting current technological trends into established organizations. Individuals who cannot adapt are feeling marginalized and left behind.



However, these new programs are exclusively online resources. Individuals who do not have reliable internet access will continue to struggle. The impacts of internet unreliability disproportionately affect rural areas of the state. According to organization representatives in Eastern and Southern Oregon, this barrier exists mainly due to the limitations in the state's broadband infrastructure. There are minimal actions heritage organizations can take to confront this infrastructure barrier.



Appendix B: Survey Results



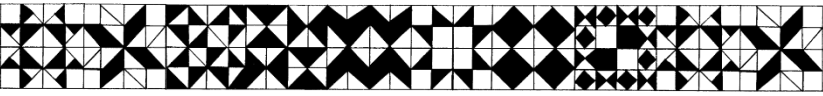
Follow [this link](#) to access a pdf of the survey results or email katie.henry@opr.oregon.gov to request an emailed or printed copy.

The survey received a total of 264 complete or partial responses between January 22, 2024, and February 28, 2024. The survey had 48 questions and was designed to take roughly 20-30 minutes to complete. It included the chance to win free entry to the Heritage Conference in April of 2024 as an incentive for participation.

Note: This version of the survey results does not include open-ended responses to protect anonymity of respondents. Email katie.henry@opr.oregon.gov if you would like to see a version of open-ended responses.



Appendix C: Interview Summary & Notes



This interview appendix:

- Shares issues and strengths found in the Oregon heritage sector from our conducted interviews
- Analyzes interviewee experiences into an overall picture of the state of heritage in Oregon

Interviewees

Oregon Heritage staff provided our team with a list of heritage organizations that would represent a diversity of sizes, locations, and focus areas. We interviewed the following organizations:

- Cascade Locks Historical Museum
- Oregon Historical Society
- Oregon Black Pioneers
- Keizer Heritage Foundation
- Southern Oregon Historical Society
- Oregon Cultural Trust
- Klamath County Museum
- Southern Oregon University (archaeology)
- Museum at Warm Springs
- Maxwell Heritage Interpretive Center

Interview Process

Our team came up with a list of interview questions that would delve deeper into the issues we saw appearing in our initial survey responses. We asked this list of questions to each interviewee during a 20–60-minute interview to ensure uniformity in findings. These questions centered around the key topics of programming, funding, collaboration, staffing, public engagements, and technology.

We have included our interviewer script and summaries of each heritage representative interview at the end of this appendix.



Findings: Issues

Our team identified the issues each respondent mentioned and grouped these issues into three categories: funding, relevancy, and capacity. Though we present these categories separately, they are extremely interrelated, and the presence or lack of one will most likely affect another. Organizations' inability to solve their problems often stems from the circular effect of how the issues interact. The following section explains each issue category and how organizations within the Oregon heritage sector experience it. It also provides examples of how the issue categories relate to each other.

Funding

A variety of complex issues surrounding funding were a common appearance in our interviews. Not only did respondents detail a general "lack of funding to complete programming", but they also listed issues in the process of applying for funding, funding sources, and funding type. This demonstrates that the problem ingrained in the heritage sector might not just be a need for more money, but more intricate and specific needs that cater to each organization specifically based on their own traits.

Some examples of funding related issues were:

- The Oregon Cultural Trust has found the online presence of grant applications challenging to staff who are not familiar with applying to grants on the internet
- Multiple organizations noted a lack of staff and volunteers, or capacity of staff and volunteers to actively apply for needed funding
- Klamath County Museum and the Oregon Historical Society struggle with donor and community expectations affecting programming due to their reliance on these groups as a main funding source
- The Cascade Locks Historical Museum struggles with foundations funding new and specific types of projects rather than more generalized funding that could support the organization's preferred programming
- The Maxville Heritage Interpretive Center has found grant funding to be overly competitive amongst heritage organizations, and that grant makers often prioritize new organizations over existing ones
- Baker City Downtown's necessary leadership positions are funded through finite grants, these positions may be cut if funding is lost

Relevancy

Many heritage organization representatives commented on a lack of engagement from younger generations, aging volunteers and leadership, and having no plan for leadership succession. Some feel that people today are just not interested in history, and this is the cause of their plight. Others acknowledge that there could be ways to engage modern youth and the public in their organization's programming, but they just don't have the funds and capacity to do so.



These issues tie together into a common theme of fear of disintegration due to losing relevancy. Many of our interviewees commented on wishing to solve this issue by spending more time and funding on youth and public engagement and succession planning, but not being able to due to lack of funding for staff or the right programming. Most organizations also seem very open to modern technology that could keep them relevant and have even begun to explore it, but just do not have the funding or capacity to truly use it to their best advantage. This demonstrates the interrelatedness of funding, relevancy, and capacity – each affects the other and creates a cycle of needs for heritage organizations.

Some examples of relevancy related issues were:

- Several organizations including the Keizer Heritage Foundation and Oregon Historical Society do not have succession plans for when leadership leaves or ages out of roles
- The Oregon Cultural Trust struggles to update their website to be engaging to the public due to barriers in staff technological knowledge
- Klamath County Museum and the Keizer Heritage Foundation have issues with online marketing techniques, finding Google SEOs and social media unhelpful
- Klamath County Museum has trouble engaging youth in their organization’s specific historical expertise
- Keizer Heritage Foundation has very low visitor numbers despite attempts at marketing through social media, local newspapers, and word of mouth
- Klamath County Museum has a hard time getting elder leadership involved with disaster resilience planning that could save the organization’s archives if a disaster occurred
- Southern Oregon Historical Society does not trust new AI developments, especially within heritage sector research and writing
- Several organizations mention lack of access to or knowledge of archival digitization tools which hinders their ability to utilize the internal benefits of digital archives, as well as engage the public through easier access to their content
- The Maxville Heritage Interpretive Center wants to find new BIPOC leadership that has lived experience and reflects their mission of sharing diverse history, but struggles to find BIPOC professionals in the area or incentivize them to move to rural Oregon
- Baker City Downtown’s volunteers are mostly in their 80’s and 90’s, once they age out of their roles the organization will not have an adequate supply of volunteers

Capacity

Generally, every organization commented on either lack of volunteers or staffing, or if not lack of staffing, then a lack of capacity amongst their staff. This was often related back to lack of qualified professionals and inadequate funding to pay staff for the time and work needed to create consistent programming and keep the organization running. Capacity was also often related back to relevancy, as many organizations felt they could not keep volunteers engaged or entice new volunteers due to lack of interest in programming or generational disconnect.

Capacity issues also manifested in the physical structures of both facilities and built resources, facilities being the organization’s headquarters, and built resources being the historic physical



structures often included in organization’s programming. Many organizations noted how staffing capacity and funding challenges often led to issues involving the well-being of their built environments. Some examples of this are running out of archive space, needing roof repairs on historic buildings but not having the funding for it, and not having money or time to plan for protecting buildings from potential natural disasters.

Some examples of capacity related issues are:

- Oregon Black Pioneers does not have a brick-and-mortar space for their operations which makes day-to-day management difficult
- The Klamath County Museum has many facilities issues and maintenance needs in their aging historic buildings
- The Keizer Heritage Foundation and Southern Oregon Historical Society staff do not have capacity to create the programming they’d eventually like to develop
- The Oregon Cultural Trust and the [Cascade Locks Historical Museum](#) noted minimal staff capacity for collaboration with other local heritage organizations that could benefit their programming and allow for joint public engagement opportunities
- The Oregon Cultural Trust and the [Cascade Locks Historical Museum](#) have staffing challenges due to lack of affordable housing for potential staff members, and overall lack of funding to pay staff
- The Klamath County Museum does not have staff capacity to refresh exhibits and keep up with archiving due to the museum’s limited open hours and remote location which makes it difficult for staff to routinely be on site
- The Oregon Cultural Trust staff lacks tech knowledge and an online presence, affecting their ability to access increasing technologies that could benefit their organization’s programming, public engagement, and grant application processes
- The Southern Oregon University Archaeology Department is experiencing a staffing crisis due to a lack of qualified professionals to hire in the field and difficulties incentivizing potential hires to move to rural Oregon
- Baker City Downtown has an unreliable internet connection that makes online engagement opportunities difficult

Findings: Strengths

In addition to the issues they were facing, interviewees also shared what was going well for their organizations. Similar to issues, we categorized these strengths into funding, relevancy, and capacity. These strengths can then be used during our recommendation-creating process to form ideas for how one organization’s success can transfer to the rest of the sector.

Funding

Several organizations seemed to benefit financially from positive relationships with local, state, or federal government, or providing a public deliverable that gives them a steady revenue. Others detailed positive outcomes from working with professional grant writers who could successfully put into words the importance of their organization’s work.



Some examples of funding successes are:

- The Klamath County Museum secures funding every 5 years from city motel/hotel tax levy
- The Keizer Heritage Foundation has a solid relationship with the City of Keizer which provides them with sustaining funding for programming and facilities upkeep
- Baker City Downtown has a strong local relationship and receives sponsorships and event funding through this community support
- The Southern Oregon Historical Society and the Keizer Heritage Museum have both found consultant grant writers successful in securing grant funds
- The Maxville Heritage Interpretive Center has networked with politicians and received congressional funding and high national visibility
- The Southern Oregon University Archaeology Department has strong funding due to their public archaeology services, often required by state and federal laws as part of compliance driven projects

Relevancy

Organizations seem to be finding success by expanding their programming options to include unique, interactive engagement opportunities that will draw in new and existing patrons. Organizations are also gaining patrons and funding with local partnerships, and programming that focuses on diversity and equity in the state of Oregon.

Some examples of relevancy successes are:

- Oregon Black Pioneers has found success with new dynamic programming like bus tours and traveling exhibits, and putting programming content on their updated website, all based around their mission of illuminating diverse stories
- The Maxville Heritage Interpretive Center has had many successful programs rooted in telling diverse stories such as creating an ethnic studies curriculum and a trauma healing program, along with programs centered around youth engagement through the arts
- The Southern Oregon University Archaeology Department has a long-standing relationship with a local public radio station where they hold a monthly radio show highlighting archaeology and heritage stories from the region
- The Southern Oregon Historical Society is finding unique ways to merge youth interests with local history through tabling and creating a comic-making contest at the Medford Comic Con
- The Klamath County Museum has had positive feedback on their tour and hike programming in Klamath County, and has made a local history book for K-12 education
- The Oregon Cultural Trust has successfully collaborated with artists by creating residencies in historic buildings
- The Cascade Locks Historical Museum has built up their public engagement through partnerships with ODOT and tourism-focused agencies



- The Southern Oregon Historical Society is in the midst of creating virtual reality programming, in particular a VR goggle installation that would allow museum visitors to “fly” over Medford’s historic downtown and see it as it was in 1930

Capacity

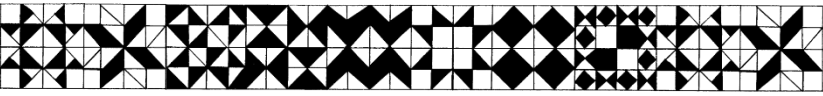
Some organizations have been able to decrease their capacity stresses by collaborating with other local heritage organizations or utilizing state support to gain operational knowledge and staff.

Some examples of capacity successes are:

- The Cascade Locks Historical Museum has had fruitful collaboration on a local level, such as through their regional museum group, the Museums of the Gorge, which holds biannual meetings, and also through collaborative programming and marketing efforts
- The Keizer Heritage Foundation finds the State Historic Preservation Office trainings and workshops to be successful opportunities to learn about operating a nonprofit, making connections, and applying for funding
- The Maxville Heritage Interpretive Center has found staffing through the AmeriCorps Resource Assistance for Rural Environments (RARE) program



Appendix D: Workshop Summaries & Notes



In April 2024, the University of Oregon project team planned and facilitated six workshops across the state of Oregon. The purpose of the workshops was to gather heritage sector leaders, volunteers, staff, and stakeholders to discuss the issues the sector is currently facing, and brainstorm ideas and recommendations to solve these issues. Participants first listened to a presentation by the project team about the issues discovered from background research, survey responses, and interviews. They then brainstormed together in small groups to discuss four main issue topics found by the project team: funding, relevancy, programming, and staffing. At the end of the workshop, participants voted on their favorite ideas and recommendations in each issue group.

The project team visited Coos Bay, Medford, Forest Grove, Cascade Locks, and La Grande, Oregon to conduct workshops in places that could be accessible to heritage professionals across the state. By visiting cities in Southern, Central, and Eastern Oregon, we were able to collect a variety of perspectives from as many different organization types and locations. The team also conducted a virtual workshop for those who could not attend in person to participate in. In total, 59 Oregon heritage organizations were represented in these workshops, and there were 70 individual participants that were able to share their unique perspective and experience with the project team.

The following documents share the notes taken by the project team for each individual workshop that we facilitated. Each document begins with key takeaways synthesized from conversations surrounding recommendations for the four issue topics. It then shares the voting results found from participants' final workshop task of choosing their favorite idea from the recommendations out of each issue topic. Lastly, it shares the full workshop notes from which the team synthesized the key takeaways.

Recommendation Distinctions

Some participants' recommendations were focused on actions that Oregon Heritage might lead, which we labeled "state-led" initiatives. Other recommendations focused on funders, which is occasionally noted as "top-down" initiatives in this memo. Finally, some recommendations were directed at the collaboration amongst heritage organizations, which we defined as "horizontal" in this memo.



Workshop Summaries & Notes

Document 1: Coos Bay Workshop Summary & Notes

Date: April 8th, 2024

Number of participants: 12

Organizations represented:

Coos History Museum
Oregon Museums Association
City of Coos Bay Parks & Adopt A Park Pilot Program
City of North Bend
Coos Bay North Bend Charleston Visitor and Convent
Marshfield Pioneer Cemetery
City of Coos Bay
Coos Art Museum
Marshfield Sun Association
Marshfield Sun Printing Museum

Key Takeaways from Brainstorm

Funding Recommendations

The most popular recommendations for the funding issue bucket included state-led initiatives such as a standardized grant portal and city-led support for WiFi and internet connections to allow better access to grants. Popular recommendations also included top-down initiatives for funders both federal and nonfederal such as a funding opportunities for staffing positions and minimizing reporting requirements for grants. There were also horizontal-focused ideas for organizations to collaborate on, such as the creation of regional political coalitions across the state of Oregon and having conversations about propositioning the value of heritage to cities.

Relevancy Recommendations

When discussing relevancy, participants discussed better access to training to teach organizations the benefits of technology in heritage programming and outreach. Participants also discussed WiFi and internet connection support in relevancy conversations – cities providing better internet options would not only allow for better grant access, but also better engagement opportunities. Participants also had ideas about horizontal collaboration – some recommended heritage curriculum collaborations with local universities, creating a presentation to show funders and legislation the need for tech services in heritage, deciding on and collaborating with a universal social media platform, and sector-wide staff training on succession planning.

Programming Recommendations



In the programming issue group, workshop participants veered slightly outside of the constructed topic due to the nebulous nature of programming. A few participants shared a popular idea for a cultural trust commission that would work regionally and handle things such as equitable funding allocation and heritage marketing (i.e. social media and newsletter creation and distribution). They also discussed horizontal collaboration through the creation of an online site where organizations could interact, share events, needs, ideas, and more. Another horizontal collaborative idea was a state-wide event where organizations would hand out passports, and with a visit to each heritage site, they would receive a stamp, and a prize if all sites were visited. Participants also discussed collaborative facilities maintenance, particularly the idea of workshops that utilize the skills of specific heritage leaders to teach others what they know.

Staffing Recommendations

The most popular recommendations for the staffing issue group were focused on collaboration and bringing in different entities to assist with heritage work through volunteering. Some examples of these entities were high schools and community colleges to create or enhance programs, local contractors to help with skilled labor, AmeriCorps and RARE, and newly retired folks to take over volunteer positions. When discussing volunteers, workshop participants also highlighted the necessity for organizations to create clear position descriptions to ensure jobs are given to the right people, and volunteer work is productive and successful.

Voting Results

Funding

Recommendations (Ranked by order of popularity)	# of Votes
Standardize grant portal	5
Political coalition to support the 101 region of Oregon	2
Funding for staff positions	2
Heritage value proposition- at city planning and place making level	1
Minimize reporting requirement	1-
Need localized/ specialized expertise	
Support in wifi / internet connection (city level)	

Relevancy

Recommendations (Ranked by order of popularity)	# of Votes
State-level monthly virtual tech trainings	5
Heritage focused curriculum (collab with local colleges)	2
Presentation to funders and legislation to create a middle-ground for technology	1
Staff training (to define what is long-term planning like succession planning)	1
Getting more reliable internet	1
Deciding on a universal social media platform for everyone	1



Programming

Recommendations (Ranked by order of popularity)	# of Votes
“Umbrella” cultural trust commission that handles funding, media, news releases, promotional material for organizations, specifically one for communities outside of the I-5 corridor	2
Heritage blog that all organizations had access to and could utilize by posting needs/collaboration ideas/funding opportunities/etc	1
Focus on maintenance and repairs by creating historic preservation workshops that utilize the skills of specific heritage leaders to teach others (Training of the trainers)	1
Passport stamp event across communities to promote engagement	1

Staffing

Recommendations (Ranked by order of popularity)	# of Votes
Create or enhance programs related to heritage in high schools and community colleges	2
For projects that require skilled labor, create opportunities for local contractors (especially newer folks who are trying to build their businesses) to showcase their work and their business	2
Host more AmeriCorps members (RARE especially)	2
Ensure volunteer jobs have really clear position descriptions and someone talks with the potential volunteer about their interests so the job can be a good fit	1
Leverage existing community events to showcase volunteer opportunities	1
Figure out a way to capture volunteers from the pool of newly retired folks and/or people who are newly moved to the area	

Full Workshop Notes

Funding

- Standardize grant portal
- Political coalition to support the 101 region of Oregon
- Funding for staff positions
- Heritage value proposition – at city planning and placemaking level
- Minimize reporting requirement
- Need localized/specialized expertise
- Support for wifi/internet connection at city level

Relevancy

- **Finding a middle-ground for non-tech users** (they feel as if there’s a 0 or 100 kind of attitude when it comes to tech, and if you are 0, then you are left in the dust.)
 - Possible presentation to the legislation or funders



- To establish tech as only tools or as a solution
 - Reliable internet
- Reliable internet is a long-term investment.
 - Do not have the capacity to look at operation budgets for subscription fees.
- **Who are our target audience?** Who belongs in these categories?
 - Youth = k-12
 - Young adults (post college-retirement)
 - Elders (65+)
- **State-wide contracts** (basically mandated without the strong scary words)
 - Trainings provided by vendors to give tutorials before being able to use something.
 - **(This one caught Katie’s attention at my table)**
- Finding a middle-ground between tech savvy and tech inadequate individuals.
 - Stable platform
 - State-funded social media training
- **State-wide monthly virtual tech trainings** (big emphasis on fun, more like an event than a “boring presentation”)
 - Engaging convention format
- Winter training sessions on social media specifically led by the state.
- Self-paced tutorials “**social media for dummies**” available online
- **Heritage focused curriculum** (targeted at higher education – potential high school grads who are deciding on majors)
 - In collaboration with state and local colleges
- Staff trainings “train the trainer” to attract volunteers.
 - Well-informed leaders will inherently attract new volunteers.
- Door-to-door/post mailers outreach for find new volunteers.
- Well-maintained and updated online toolkits.
 - There’s not a need for more toolkits, but making the existing ones more relevant.

Programming

- Stamp passport system amongst organizations to encourage people to visit, one day (or more) where you get a stamp when you visit each museum
- Streamlined funding – less obstacles (1)
- Meetings and collaboration that are easier to access, such as a heritage blog that organizations could comment on with questions/comments/ideas/collaborations/needs (1)
- Work more with middle aged youth, young adults (8th graders+) such as with volunteer programs, take programming to them so they don’t have to seek it out
- De-localize collaborations by creating an online tool (ex. A listserv) where organizations can post needs or wants re: programming and collaboration
- Focus on maintenance and repairs by creating historic preservation workshops that utilize the skills of specific heritage leaders to teach others (Training of the trainers) (1)
- “Umbrella” cultural trust commission that handles funding, media, news releases, promotional material for organizations, specifically one for communities outside of the



I-5 corridor. This commission would ensure equitable funding and assistance to all organizations and create a system of marketing for heritage in its specific community. Would use social media, would create examples of how tech programming would work for organizations like a guidebook, ex. (2)

- Promote the Oregon Heritage all-star community designation to communities without
- One place to go for all grants, such as newsletter
- Getting creative with staff roles to fill staffing gaps

Staffing

- Promoting volunteerism is critical – it has been really difficult to get people to engage
 - Ex. staffing the historic commissions at City of Coos Bay and North Bend have been really difficult – very hard to recruit
 - Many people have no idea any kind of historic preservation program exists (one reason they don't volunteer)
 - It's difficult/non-tenable to ask lower income folks and folks with families to volunteer – they don't have time/capacity and are worried about basic needs
- **Youth involvement** – promoting youth engagement
 - Work via high schools and community colleges to create/enhance programs related to heritage
 - Get more Marshfield HS students involved in maintenance of the historic cemetery on the school's property
 - Piggyback on existing events to raise awareness of heritage-related opportunities
 - Recruit from extracurricular activities/clubs
 - AmeriCorps
 - Host more RAREs and get them to stay
 - Host more AmeriCorps in general - offer creative solutions around housing to make AmeriCorps more feasible: ex. work with local folks the AmeriCorps member might touch in their work to find someone with a room they can provide at a discount
 - Create clear mentoring/hand-holding for HS-age volunteers so they don't feel intimidated by the tasks
 - Offer incentives for volunteering
 - Create an opportunity that feels like a job – it should be interesting, appealing, and exciting
- **Volunteer appreciation** – build ways to ensure volunteers feel valued
- **Better publicize opportunities for volunteering** – many people don't know where to look and might be suspicious of what they're getting into
 - Focus on transparency – each position should have a clear position description so the volunteer knows exactly what's being asked of them; this should be paired with an initial conversation with the volunteer about their interests to gauge whether it's a good fit and what they're most interested in contributing
 - For volunteer opportunities that require skilled labor – offer it as an opportunity for businesses to showcase and advertise themselves



- Ex. A new contractor wants to build up business, but don't know how to "break in": let them do a volunteer project and brand it/showcase it
 - Need for an "Indeed" for volunteers – LinkedIn does this, but not all orgs many know about this, and not all possible volunteers will be on LinkedIn
 - Have a presence at community events as a way to recruit new volunteers – this is a great way to build energy
 - Recruit people who visit museums and libraries – these spaces are often where people demonstrate an interest in heritage-related activities, so they should be key places to publicize opportunities
 - This could be a way to recruit people who are new to the area: those with an interest in history/heritage might be going to the museums/libraries as their first way to learn about a new place
- **Succession planning/capturing knowledge** – this is a big issue when older volunteers retire and don't leave notes behind about how they did things; organizations need resources/trainings to help them record knowledge/pass along knowledge
 - How could we capture recordings/oral histories of really great volunteers? Who could host these recordings?
- **Best practices for volunteer management** – many orgs would benefit from having a list of creative ideas for them to try. Could the Oregon Museum Association or Oregon Heritage work on getting these resources in front of folks/hosting workshops about it?



Document 2: Medford Workshop Summary & Notes

Date: April 9th, 2024

Number of Participants: 15

Organizations Represented:

Phoenix Historical Society

Talent Historical Society

Guardians of the EP Museum

Oregon Historical Society

Applegate Valley Historical Society

Walk Ashland

Independent – Self

Crater Rock Museum

Roxy Ann Gem and Mineral Society

State of Oregon

Rogue Valley Genealogical Society

Key Takeaways from Brainstorm

Funding Recommendations

Workshop participants heavily focused on grant recommendations. Chiefly, workshop participants expressed the need for more top-down financial support from state organizations – namely the Oregon Cultural Trust. Derived from this need, heritage organizations voiced a need for operational-based funding to support daily operations and pay staff. In addition, organizations also conveyed a need for a standardized grant portal to submit desired grant applications – which is considered a state-led initiative. Other popular state-led recommendations include tax incentives for fixed-income volunteers and improved grant programs (e.g., a grant directory and/or an institutional memory program). Aside from grant recommendations, organizations also discussed a desire to partner with local universities to host work studies/internship opportunities.

Relevancy Recommendations

There was widespread interest among heritage organizations to redefine the significance and purpose of heritage on a state level. Several workshop participants were concerned about the negative connotation surrounding heritage today. As a result, some of the most popular recommendations focus on youth engagement at the K-12 education level. Organizations hoped to garner interest among high school-level students who may become heritage professionals in the future. Participants also noted proactive horizontal collaborations with local teachers to integrate heritage into their curriculum. Aside from youth engagement, organizations also discussed the integration of technology into operations. Many



organizations came to a consensus that a dedicated tech support role is needed within the sector that organizations can contact when needed.

Programming Recommendations

The recommendation with the most votes was improving the expansion and inclusion of the current heritage coalition. This classifies as a horizontal-focused recommendation that requires more collaboration across organizations. Separately from this, organizations were interested in incorporating new programming to engage patrons on a broader level. For example, the idea of a cultural passport where patrons can receive stamps at partnered organizations – this idea is inspired by visa stamps travelers receive in passports. Another engagement-oriented program idea centered around regularly celebrated themed heritage days in local communities. These themed events would help organizations redefine heritage to younger generations.

Staffing Recommendations

Participants were interested in better connecting heritage organizations with Small Business Development Center (SBDC) and other business support services. At the SBDC, heritage organizations can seek guidance on administrative coaching and sharing resources. Sharing resources was another reoccurring topic among workshop participants – shared staff was the most frequent resource mentioned. Organizations specifically said a volunteer coordinator position and administrative positions would be most beneficial to share among organizations. Administrative position responsibilities include bookkeeping and HR activities. Conversely, organizations had split interest when discussing the future of heritage volunteers. Some organizations were interested in targeting young student-age volunteers, while other organizations proposed focusing on older volunteers since older volunteers may have more capacity to dedicate to heritage responsibilities.

Voting Results

Funding Recommendations

Recommendations (Ranked by order of popularity)	# of Votes
Cultural Trust + potential increase in endowment used for operational funding. Generally, more support from the Trust	7
Standardized Grant Portal	6
University partnership for internships/work studies	3
State lead incentives (e.g. tax relief) for fixed-income volunteers	3
County/ Regionally hired grant consultant	3
Redirect more of the state budget to heritage (divert from kicker)	1
Create institutional memory for grant	2
Aggregate funding source directory	2
Tourism Taxes	2
Assistance with political coalition building, including local commission	1
Mentorship program compensation	1
How to staff a board of directors	



Relevancy Recommendations

Recommendations (Ranked by order of popularity)	# of Votes
Presentations to high schoolers (High schoolers considering college)	6
Redefining Heritage on a state-level	5
Tech Support person (on-call for organizations to utilize)	4
Teacher-focused outreach to ESD or organizations attending teacher conferences	4
Monthly Themed Learning Days for youth engagement + show-and-tell	4
Tech-Oriented workshop	2

Programming Recommendations

Recommendations (Ranked by order of popularity)	# of Votes
Improved coalition expansion and inclusion	6
Cultural Passport	4
Digitization Plans	3
More youth engagement to explain the importance of heritage	3
Collaboration opportunity: marketing strategies – collective funding	2
Going to the people approach	2
Redefining Heritage through collaborations/events (ex: Kids Day expo)	2
Shared resources: guest speakers	2

Staffing Recommendations

Recommendations (Ranked by order of popularity)	# of Votes
Plug heritage organizations into SBDC services (by getting them on mailing lists, working with SBDCs to ensure they offer nonprofit-related coaching, and passing these opportunities along to heritage organizations)	8
Shared staffing – volunteer coordinator position (could be housed with Jackson County Heritage Association?)	5
Shared staffing – administrative positions (bookkeeping, HR) and fundraising (grant writing) positions (could be housed/coordinated by Jackson County Heritage Association?)	4
Work to frame heritage organizations as legitimate businesses that contribute to the economy	3
Leverage estate management/sales as a way to reach potential new volunteers/folks who might be interested in heritage	3
Focus on younger volunteers: via Career Day, Capstone projects, etc.	2
Focus on older volunteers: via Access Senior Fair and other events where retirees might be	2



Full Workshop Notes

Funding

- Cultural Trust
 - Finance and increase endowment
 - Tax credit
 - Increase political support for trust
- Taxes
 - General fund from kicker
 - Increase budget for SHPO
 - Tourism taxes
- State Incentives
 - Stipend for volunteers
 - Tax relief for fixed-income volunteers
- Grants
 - Standardize grant application
 - Improve and consolidate grant portal
 - Regional or Shared Grant Writing Staff
- University
 - Internship partnerships

Relevancy

- K-12 program engagement – youth engagement
- Monthly themed learning days
 - Ex: Earthquake Day as an education-focused event
- Tech-Oriented workshops – tech support
 - On-call tech support person
- ADA accessibility – user friendly for everyone
- Tactile artifact show-and-tell.
 - Focused on 4th graders.
 - Possibly at the monthly themed days
- Redefining history – making it more relevant and significant today.
 - To combat social cynicism
- Larger organizations helping smaller ones.
 - PSA announcements for areas without reliable connection
- Target High schoolers (art & history)
 - 'Going to them' approach to presentations.
- ESD – collab w/ teacher trainings
- Heritage organizations attending teacher conferences.
- Nighttime cemetery tours
 - Trying to appeal to young adults through an interest of the paranormal.



Programming

- Better youth/public engagement through social media and online mechanisms, particularly through explaining the importance of heritage to them in a way that feels relevant to their lives and programming that creates feeling and relatability (4)
 - Ex. pull in people who don't know about history/heritage by each town having a "theme" that maybe isn't heritage-related on the outside but is rooted in heritage to show that heritage is everywhere and that people who think they may not be interested in it are actually experiencing it/enjoying it daily (1)
 - Collaborations between towns: bring themes together for shared events/marketing (collaboration > competition)
 - Ex. "Kids Day": every museum/organization participates by creating an activity or event centered around youth, families can bring their kids around to different locations to participate in each different one (2)
- Collaborations between organizations locally has been helpful to small organizations – more of this plus more regional meetings of historic societies so everyone can lean on each other
 - Broadening the already existing heritage coalition to be more inclusive, and allow organizations to show what they are doing/ask for assistance/share needs (6)
 - Shared speakers for organizations to utilize (4)
 - Shared digitization plans/toolkits (1)
 - Share "pockets of excellence" within community – each person/organization has a skill and expertise that is standardized and/or created into a toolkit that can be shared locally/regionally/statewide (1)
 - Shared social media calendar to share events (1)
 - Collaboration opportunity in the form of a common marketing strategy amongst organizations: would use collective funding (1) to use marketing to benefit all organizations involved
 - Mix of well-funded organizations and smaller organizations with smaller budgets to use strategy and lift each other up and allow easier access to smaller organizations to join and participate (2)
- Easier connections and access to state organizations and SHPO, particularly in terms of heritage organizations that are located far from Eugene/Salem/Portland and don't have great access to internet/tech savvy. Ways for organizations in Southern Oregon to keep up to date with SHPO without being able to be present for things like the Heritage Conference in Cottage Grove this month
 - An idea for this was interest groups that meet virtually and in person that include not just people interested in Oregon heritage but people all over the country (or even world) coming together via Zoom once a month to discuss a specific heritage-related topic. Could be helpful to look outside a region/state to find like-minded individuals to make more people engaged in an organization's programming. Also having a group that meets regularly keeps people involved and interested in an organization



- Open house events with a theme for each event: this would be a social opportunity for the community to gather, a way to recruit volunteers, and get people aware of organization
- Newsletter idea: have a “mystery photo” of a place in the community, people respond to email with guesses of where the photo was taken. If they get it correct they get a prize (1)
- McMenamins passport idea: “Passports” are distributed at each heritage location, people get a stamp when they visit a specific location. Goal is to get a stamp for each location in the passport (4)
 - Also: History Hunt where there is an overarching mystery, and a “clue” at each heritage location. People gather the clues by visiting all locations to solve the mystery
- History Day across the state: traveling history field trip to Oregon historic sites via bus tour – day long experience with historians, potentially hotel to hotel
- Putting history where the people are rather than expecting them to come to it (2)
 - Ex. Having an exhibit at each county fair, collaborate with Oregon Historical Society (2)
- Movie theater marketing: historic trivia in local movie theaters before movie starts plus advertisement for local organizations with the trivia
- Slogan for the Oregon heritage sector as a whole that all organizations utilize together
 - “Maybe if people would listen, history would stop repeating itself” OR
 - “Learn your history or you’re destined to repeat it” (1)
- Collaboration between newspapers and heritage organizations
 - People can bring in photographs to be digitized and then have their photos archived/potentially shared with the public to highlight local historic stories
- Mentor program in state (1)
 - Ex. Archival techniques
- Program/toolkit specifically targeted at estate managers to take care of historic items found in large estates that will save historic items and also bring people into heritage (1)

Staffing

- **Heritage as an economic driver**
 - Frame heritage organizations as legitimate businesses that contribute to the economy
 - Provide funding/discounts for heritage organizations to join Chambers and other economic development groups
 - Plug heritage organizations into Small Business Development Center (SBDC) activities so nonprofits can get more professional development opportunities – ensure nonprofits are on the SBDC mailing list and that those opportunities are being passed along to heritage orgs
 - Particular need for support around grantwriting – we need to cultivate grantwriting skills among heritage volunteers and staff
 - Leverage Transient Room Taxes (TRTs) to help fund heritage orgs (would require lobbying Counties to designate more TRT \$ to heritage orgs)



- There is a lack of qualified insurance appraisers (almost impossible to find someone locally to appraise collections) – could a heritage organization take this on as a side-business that could generate income?
 - Someone would have to help with the funding to cover staff training/certification, but then the income from their services should be able to more than cover costs
- **Recruiting more younger volunteers** – especially hoping they could help with social media and websites; recruit from high schools, Capstone students at SOU, and community colleges
 - Potential access point: Career Day – more heritage organizations should have a presence at these events
- **Recruiting more adult and older volunteers** – it may be more feasible to focus on this group since these are the folks with time
 - Potential access point: estate management and sales
 - This is often when adults first get in depth contact with their heritage (when they're cleaning out their parents/grandparents homes and encounter lots of artifacts that they aren't sure what to do with)
 - Heritage organizations could more actively make themselves available to folks who are going through this process, and in the process, potentially get someone interested in volunteering
 - Potential access point: Access Senior Fair – have more of a presence from heritage organizations at this event
 - Senior fairs are often focused just on senior's needs (transportation assistance, housing assistance, etc.) and this really overlooks the ways seniors can contribute and be an asset to their communities
 - We want to capture the wealth of knowledge and experience of our senior communities
 - There is generally a need for someone to better understand how to reach and recruit people who are just moving and/or retiring to an area
- **Shared staffing** – how might administrative and fundraising tasks be shared among very small organizations via shared staff positions (for bookkeeping, grantwriting, etc.)
 - Explore if this could be coordinated and housed at the Jackson County Heritage Association
 - Explore if Jackson County Heritage Association could house a shared-volunteer coordinator position
 - The position of volunteer coordinator is critical – this helps ensure volunteers are found, happy, and stay, but most organizations can't afford this
- **Retaining volunteers** – holding on to volunteers is just as hard as recruiting them
 - Volunteer positions need very clear job descriptions
 - Volunteers, especially young people, need incentives
 - Volunteering opportunities need to be fun or people won't stick around
 - Create a resource that lists creative incentives and ways to keep volunteers interested and disseminate widely/host workshops around this topic
 - Incentive idea: give out money/vouchers for food for senior volunteers



Document 3: Virtual Workshop Summary & Notes

Date: April 16th, 2024

Number of participants: 9

Organizations represented:

Bureau of Land Management

Oregon Frontier Chamber of Commerce

Friends of Vista House

Graduate student in Arts Administration, Education, and Policy

Friends of the Oregon Caves and Chateau

Britt Music and Arts Festival

Linn County

City of Newberg

Philip Foster Farm Historic Site

Key Takeaways from Brainstorm

Funding Recommendations

The most popular recommendations were state-led initiatives that focused on political strategies to broaden the tax base that contributes to Oregon heritage. Participants were also interested in grant resources from the state to address how organizations learn about and interact with grants and philanthropic donors. The group hoped the state could adjust funding schedules and requirements to operate on longer timescales, which could greatly benefit heritage organizations' long-term goals. A novel idea from this workshop came in the form of a horizontal recommendation to engage in joint fundraising efforts with schools.

Relevancy Recommendations

The group prioritized horizontal recommendations in the form of collaborations between organizations, especially schools. There is a need to lower the barriers to entry into the heritage sector by providing youth with sufficient mentoring and training to ease them into their responsibilities. This group also recognized that technology, especially interaction with social media, plays an important role in their organization's relevancy, however, they lack the capacity or expertise to engage with it. The group therefore suggested state-led initiatives to create shared or regional staff and/or trainings to support organizations' use of technology.

Programming Recommendations

Participants focused on the need for better collaboration between organizations. State-led or horizontally driven policy to encourage larger organizations to start and continue connections with smaller organizations was a popular recommendation, as well as the coalition of smaller organizations around a similar cause. The group also discussed partnerships with federal



programs to assist in building maintenance and the need to stay apprised of the latest programming trends to stay relevant.

Staffing Recommendations

The most popular staffing recommendations related to volunteerism. The participants agreed that organizations need to better incentivize volunteerism. This could come from state-led trainings, horizontal partnerships with high schools to offer internships, and internal recommendations for organizations to better incorporate the needs of children and families into how they structure their volunteer positions. The group also supported the idea of shared staffing across organizations, which could be horizontal or state-led.

Voting Results

Funding

Recommendations (Ranked by order of popularity)	# of Votes
Broaden the tax base that contributes to Oregon Heritage	4
Database of Grant Opportunities; website style accessible anytime	3
Philanthropy + Organization Match Service	2

Relevancy

Recommendations (Ranked by order of popularity)	# of Votes
Collaborations between organizations and schools for presentations and field trips	2
Shared Staff / Regional Position for Technological Support	2

Programming

Recommendations (Ranked by order of popularity)	# of Votes
Beneficial for larger heritage organizations to reach out with/start connections with smaller organizations (streamline communication)	2
Bringing together organizations for similar causes allows for collaboration and an opportunity for marketing organizations	1

Staffing

Recommendations (Ranked by order of popularity)	# of Votes
State promotion of volunteerism (especially younger and retired folks)	1
Make it possible for folks with kids/families to volunteer together (so parents don't have to find childcare)	1
Shared Staffing; like a Council of Governments for heritage-related organizations	1



Full Workshop Notes

Funding

- Cultural Advocacy Coalition; review the capital application; now accepts historic property
- Database of grant opportunities; to access at anytime
 - Broad overview of the type and requirements of grants
 - Assists institutional knowledge
 - Email exists like this. Once a month
 - Who proctors this?
- More consistent form of grants
 - Tax base?
 - Federal? Local
 - Short Term Rental Tax (tourism)
- Travel Oregon Meeting (lack of presence from other heritage organizations)
 - Inviting politicians to the organization's locations rather than traveling to them
 - Work with local high schools for their fundraising
 - Watching the scoring of grants is a helpful service
 - More than two hours, very thorough
 - Philanthropy Match (Dating App for Money)

Relevancy

- Young People care and are welcome at the table
 - Mentoring people into larger roles (into less intimidating roles)
 - High school and college students
- Re-introducing volunteer hours into school curriculum
 - Collaborations between organizations and schools for presentations and field trips.
 - Local collaboration, mostly.
 - MakerSpace
 - Ex: Talent's Girls Build
 - Ex. Talent Maker City and CraterWorks MakerSpace
 - Comfortable lodging for these activities
- Tech support
 - On-call tech (social media, etc.)
 - Regional position X
 - A membership organization with designated staff members to help with tech
 - Sharing this staff member among organizations. X
 - Helping with social media, logistics, and overall support
- Re-engaging people who have listed their properties (other areas, maybe too)
 - Accessible toolkit

Programming

- **Programming: fulfilling programming desires, keeping up with programming trends**
 - Anniversary events, events in general



- Silent auction
 - Themed events, dress up
- **Facilities and maintenance upkeep**
 - Reaching out to Job Corp (federal - USDA) that has classes for students hoping to get involved in trades (eg bricklaying, masonry, carpentry)
 - HistoriCorps (AmeriCorps)
 - National Trust for Historic Preservation
 - Friends Alliance for parks
 - Public Land Alliance
- **Collaborations: connecting with other organizations and the state to benefit selves and each other**
 - Beneficial for larger heritage organizations to reach out with/start connections with smaller organizations
 - Streamlining, communicating from larger to smaller organizations XX
 - Bringing together organizations for similar causes, allows for collaboration and an opportunity for marketing organizations
 - More staff/capacity for collaborations to even happen
 - Joint events where organizations come together to discuss a topic that unites organizations

Staffing

- **Volunteering - general idea/recommendation for all volunteering ideas: provide more resources/toolkits/workshops to help orgs better recruit and retain volunteers**
 - (See some ideas about encouraging volunteering for youth under Relevancy)
 - Since the pandemic, it's been hard to spring back the volunteer numbers (many older folks may be nervous about doing things in person)
 - **Offering incentives** - what will volunteers gain by working with you? It is important to communicate the benefits to your volunteers
 - Training: provide some specific training that will make them more compelling on the job market (ex. Train them as grant writers)
 - Ex. For college and high school level volunteers I (Rachel, Newberg) recently developed a full job description for our commissions detailing the commitment and the benefits of doing so. It helps some.
 - We specifically call out that this is a great resume builder and the skills they will gain
 - Ex. Trauma Intervention Program Northwest (TIPNW) [a regional affiliate of a national org] - Intensive training offered at the beginning of the volunteer experience (training volunteers to be emotional first responders) - offers lots of great experience and great connections for understanding how things get done in the community → helps with RETAINING volunteers
 - Ex. Friends of Trees - a very broad demographic of volunteers; lots of both tangible and intangible benefits, makes people want to stay engaged
 - Ex. For the hangar, we provide an incredible piece of history right in their backyard! We are going after the locals yet we get a lot of folks from all



over the place who love WWII history! The Statue of Liberty would fit in our hangar!!

- State promoting volunteerism?
 - Especially for younger folks and retired folks
- **Shaping opportunities to meet volunteers' needs** - define barriers and then come up with ideas to be flexible with folks:
 - Offer off-site volunteer opportunities/flexible hours
 - Make it possible for folks with kids/families to do it all together (so parents don't have to find childcare)
- **Recruitment** - ideas for where to recruit folks:
 - Retired school teachers = great volunteers!
 - Folks who need a second job - train them to be grant writers
 - At existing events - tabling is a great place to recruit folks
 - Partner with other local or regional orgs so you can jointly recruit
 - Greeters with the local Chamber
 - Displays/info posted at places people are likely to visit (ex. Visit Grants Pass exhibit hosting info about other orgs)
 - Offering special, "exclusive" events to draw folks in, get people interested, find staff and board members
- Leverage "cross-pollinating" by engaging with other orgs and other sectors: what are folks in other volunteer spaces doing - we can learn a lot from how others are engaging volunteers
- **Paid Staff**
 - (See shared-staffing idea, like a Council of Gov'ts for nonprofits/heritage-related orgs, under Relevancy)
 - Jobs need to offer healthcare
 - Concern that if you work full time, you won't qualify for state healthcare



Document 4: Forest Grove Heritage Conference Workshop Summary & Notes

Date: April 22nd, 2024

Number of participants: 14

Organizations represented:

State Library
Independent/contractor
Tamastslit Cultural Institute
Relicura, LLC
Hillsboro Historical Society
Oregon Historical Society
Oregon Heritage Commission
Historical Research Association
Old Aurora Colony Museum
Keizer Heritage Foundation
Oregon Parks and Recreation Department
Tillamook Co. Pioneer Museum
Yamhill City Historical Society

Key Takeaways from Brainstorm

Funding Recommendations

Participants focused on top-down initiatives led by funders, specifically asking for more operational funding rather than program-specific funding. They requested several other grant-specific changes such as longer timelines for project funding, trainings on applying to grants, and networking and relationship building with funders. Workshop participants also wanted a consolidated online resource where organizations could easily access funding opportunities, and support for administrative functions like accounting and grant writing from Cities and Counties.

Relevancy Recommendations

Participants discussed how it would benefit organizations if the state created a toolkit for creating succession plans. They also felt it would help organizations if they updated this plan annually to accommodate for changes that occurred over the year. Along with this, participants talked about board member involvement, and how it could be helpful for organizations' board members to interact with daily operations to help them better understand the organizations' needs and concerns. Participants also discussed how the heritage sector tells their story and which narratives they choose, focusing on the need to redefine these stories to stay relevant and be inclusive. Lastly, participants discussed engaging organizations in digital and tech innovations by collaborating with local companies.



Programming Recommendations

Workshop participants felt the most important programming idea brought to the table was the adaption and creation of inclusive programming that subverts previous harmful narratives, instead focusing on intentional and educational stories that center justice and equity. The group felt the best way to do this was to engage youth in programming creation to include their valuable perspectives and ideas. Participants felt guidance from the state about how to collaborate with schools and curriculum more often and more effectively would be useful. Participants also discussed ways to involve key heritage leaders in workshop- and training-creation so programming ideas could be shared and spread. A way to do this would be for the state to create an award for heritage “All Stars” who would then be involved in the creation of a programming training workshop for other heritage organizations.

Staffing Recommendations

Workshop participants requested guidance from the state on how to access educators to increase interest in heritage fields and encourage heritage fields as a profession to young people. They also discussed barriers to training for all levels of heritage professionals and requested more affordable and relevant training opportunities for organizations to utilize. A resource guide that would help organizations find funding sources for professional development was discussed, along with an emerging professionals cohort model that would bring a group of those newer to the profession together each year for training and networking. Participants also discussed housing as a barrier for new hires and offered some creative solutions for housing staff.

Voting Results

Funding

Recommendations (Ranked by order of popularity)	# of Votes
Operational Fundings from private and public grant funders	6
Consolidated Funding Opportunities/ Resources Website (not email)	6
County/City Supported Admin	4
Networking/ Relationship Building	2
Strengthen the Meet the Funder concept	
Continual and repeated interactions with prospective funders and partners	
Longer timelines for project funding	1
Grant Focused Trainings	1
Lottery Funding Ballot Measure	1

Relevancy

Recommendations (Ranked by order of popularity)	# of Votes
Annual succession plan checklist	3
Redefining historic storytelling to be inclusive	2
Policy leadership/board members seeing daily operations	2



Tech resource collaboration with companies	1
Formalizing onboarding trainings	1

Programming

Recommendations (Ranked by order of popularity)	# of Votes
Inclusive programming that honors many narratives at once – subverting previous ideas of how programming is presented in Oregon with intention	3
Utilize youth to shepherd in inclusive narratives	3
Expand State Park Interpreter Training program to make more accessible and assist organizations with program creations	2
Create an All-Stars Interpreter Award that would recognize people doing outstanding work in the field, create a program where they could help other organizations struggling with their specialty	1
Overarching guidance, perhaps from state, about how to get into and communicate with schools to include heritage programming in their curriculum as well as bring them to heritage sites and utilize heritage organizations	

Staffing

Recommendations (Ranked by order of popularity)	# of Votes
Provide guidance about how best to access the right people in schools (K-12 and higher ed) who can make connections with students who might be interested in heritage or who are studying heritage-related fields	3
Explore opportunities to help organizations deal with lack of housing for new staff	2
Ensure there is a good range of affordable training opportunities that are relevant to various levels of heritage professionals (from emerging through executive level)	2
Create a resource guide that clearly identifies funding sources for professional development	1
Develop an emerging professionals mentorship program that uses a cohort model to connect emerging professionals to each other each year	1

Full Workshop Notes

Funding

- Operational Funding
 - Primarily from private grantors
 - Limited funding sources, unsure how to expand pool
- Networking/ Relationship Building
 - Strength the Meet the Funder concept
 - Continual and repeated interactions with prospective funders and partners



- Shared Board of Trustees
- On-going project funding
 - Increase the length of time project funding covers, currently the 1-2 year cycle is too quick for organization
- Grant Timelines that align with meaningful and sustained partnerships
- Cultural Trust License Plate
 - Better advertisement
 - Bigger cut
- Lottery Funding
 - Ballot measure to increase proceeds to heritage orgs?
- Consolidated Funding Opportunities
 - Resources available
 - Requirements
 - Timelines
 - On a website not an email
- County/ City Supported Admin
 - Grant writer
 - Bookkeeper etc.
- Trainings
 - Grant focused trainings
 - Encouraged or incentive by state to remove stigma around attending.

Relevancy

- Openness to change.
 - Attendance from larger organizations
 - Policy leadership/board members seeing daily operations to see what really happens.
- Engagement with schools
 - Paid internships
 - Additional incentives: housing
 - Alternative – internships managed by other organizations like the RARE program who will/intern with organizations.
 - Funded through grant funding (existing programs for inspiration)
- Tech Resources
 - Collaboration with large tech companies
- Transparency with succession planning
 - Annual Succession planning checklist
 - Preferably with consultants
 - Online toolkit could be helpful as well.
- Accessible administrative resources
 - Another possible online toolkit
 - How to be an organization toolkit
- Formalizing on-boarding trainings
- Summer programs – collabs with schools
 - Different ages have different responsibilities.



- Monthly themed days for presentations and exposure
- Historic storytelling becoming inclusive for everyone.
 - Incorporated in everything we do

Programming

- Expand State Park Interpreter Training program to make it more accessible (2)
 - This program could allow for a certified interpretive guide in each county that could help organizations with programming ideas and creation
 - Since it already exists, it would be easier/cheaper/more beneficial to continue to expand something useful that already exists rather than “reinvent the wheel” and spend time and money on new things
- Simplified volunteer and programming utilization and management
 - Having strategic plans and a place for them: i.e. a binder that could also be digitized that will help with operational organization, clarity, and consistency as volunteers/staff phase in and out
- Create an All-Stars Interpreter Award that would recognize people doing outstanding work in the field, create program where they could help other organizations struggling with their specialty (1)
- Reconsidering job requirements by “lowering standards” of educational expectations on prospective hires. Focus hiring more on prospective staff’s experience and knowledge than educational degree or status (1)
- Tie programming more directly to organization’s missions
- Summer programming centering around youth and art
- Inclusive programming that honors many narratives at once – subverting previous ideas of how programming is presented in Oregon through intentionality (e.g. navigating pioneer narratives and collaborations while building equity and sharing other narratives) (3)
 - Use of youth in changing these narratives (3)
- Figure out how to navigate school curriculum to get youth more involved
 - Overarching guidance, perhaps from state, about how to get into and communicate with schools to include heritage programming in their curriculum as well as bring them to heritage sites and utilize heritage organizations
- National History Day to get youth involved and include rural and coastal cities

Staffing

- **Housing** – it can be difficult to recruit staff because of local conditions (such as lack of housing) that might make it difficult for them to move to the community for a job
 - Orgs should be transparent about the local conditions and make potential hires aware of things they might struggle with, like housing
 - Explore co-locating housing on historic sites (OPRD is exploring this and maybe other sites should as well)
 - Leverage board members’ local connections to help find temporary housing (ex. if they know someone who has a place someone can stay for awhile while they sort out housing)



- **Youth engagement** – how do we get more young people interested in volunteering and/or going into careers in heritage?
 - Develop relationships with college career counselors
 - Work with them to create formal internships
 - Make sure they are aware of heritage opportunities and passing those along to the students they work with
 - It is really helpful if internships offer stipends/are paid to attract folks
 - Develop relationships with faculty in relevant fields
 - Create a guide about how to “get in” with the right people in higher education
 - (A lot of important connections with faculty were lost during COVID and it’s been difficult to build that back up)
- **Professional development for staff** – how do we retain and grow the talents of our staff?
 - Professional development opportunities often cost money
 - Organizations need help identifying sources of funding that would cover staff professional development/continuing education – maybe a resource guide provided by the state?
 - Make more training opportunities available that are:
 - Remote
 - No cost/low cost and/or where scholarships are offered
 - Offer tiers of training opportunities so there is something for everyone: emerging professionals, mid-level professionals, executive-level professionals
 - Sometimes it feels like the content of workshop/gatherings is too basic for some senior level folks
 - Onboarding/emerging professional idea: create a cohort of newer professionals each year who can meet regularly (mostly remote, but once or twice in person) so they can learn from each other, get trainings, and develop their networks



Document 5: Cascade Locks Workshop Summary & Notes

Date: April 25th, 2024

Number of participants: 10

Organizations represented:

Oregon Folklife Network
Portland Area Theatre Alliance
Columbia River Gorge National Scenic Area
Cascade Locks Historical Museum
City of Hood River
Mainstreet Cascade Locks

Key Takeaways from Brainstorm

Funding Recommendations

The most voted recommendation covers the need for longer-term funding from top-down funding sources. Longer-term funding can include operational funding and funding for paid staff. Organizations expressed the need for comparable grant application processes to grant rewards – smaller grant rewards should be accompanied by a more streamlined grant application process. Organizations also conveyed a need for a streamlined grant submission process that is accessible to those without much grant writing experience. Organizations also discussed inaccessible resources provided by state-level organizations. Organizations wished to see these existing resources be communicated more clearly. Finally, organizations highlighted demonstrating value propositions as a top recommendation.

Relevancy Recommendations

Much of the discussion surrounding relevancy targets behaviors and challenges conventional perceptions of heritage. Therefore, some of the following recommendations will be less actionable at a state-level. The most voted recommendation covers redefining the purpose and significance of heritage. Organizations voiced the importance of collecting and inviting more inclusive histories by acknowledging existing privileges and implicit biases. The redefined version of heritage will combat negative connotations and nuances the public may believe about the sector. In addition, many organizations wished to see more volunteer barriers addressed – e.g., offering childcare to volunteers with families or offering virtual volunteer opportunities. Finally, organizations discussed the possibility of appointing subject matter experts (tech expert, administrative expert, etc.) that organizations can connect with.

Programming Recommendations

The most voted recommendations from the programming issue group primarily align with horizontal collaborations between organizations. Many of the discussion surrounding programming related to inter-organizational collaboration. For example, a top idea provided by



the workshop participants is to connect with heritage leaders to solve community problems and strength the Oregonian identity. A related recommendation is improving the training for cultural leaders so interactions between organization types are more seamless and less transactional. Overall, organizations expressed the need for more trainings and programs oriented towards education existing heritage organization members.

Staffing Recommendations

The staffing issue group focuses on the emerging concern – fewer emerging professionals in the heritage sector. Organizations pushed for more accessible administrative resources and trainings to accomplish administrative tasks. The staffing issue group also covers broader societal issues like limited housing availability for staff and value propositions. The overall idea from the staffing issue if organizations are taught how to express their value to the community, then more volunteer will come, interested students will become future professionals, etc.

Voting Results

Funding

Recommendations (Ranked by order of popularity)	# of Votes
Longer Term Funding	6
Value Propositions and Economic Development Proof	5
Allow paid staff in all grants	5
Streamline and scale grant applications	3
Diversify funding Portfolio	1
Make grants more accessible to non-specialist	1
Regional SHPO Representatives	1
Better communication/marketing of existing resources	1
Allow in-kind to count as match (Cost-share)	1

Relevancy

Recommendations (Ranked by order of popularity)	# of Votes
Inviting other cultures by acknowledging existing privilege & implicit biases	5
Collecting more diverse, relevant histories	4
Routine Access to SHPO -> access to subject matter experts	3
History/heritage as a family-oriented experience with expert community members	3
Offer childcare for family volunteers/volunteers who need it	2
Digital Volunteer opportunities	2



Programming

Recommendations (Ranked by order of popularity)	# of Votes
Un-silo heritage leaders to share experiences and organically solve problems through rural/urban collaborations, building a shared identity as Oregonians, co-funded amongst organizations	5
Training for cultural leader/artist handling to make experience for cultural leaders less transactional when organizations (i.e. libraries, museums) are utilizing their skills for programming	3
Being intentional about community relationships through increasing availability for collaboration and time – making relationships longer, deeper, more frequent – promoted through fixed, accessible shared resources throughout the state	3
Educational programming – utilizing existing educational leaders – easier access to these leaders	2
Embracing phone culture through programming – self guided tours	2
Small programming that will be accessible for organizations with low budgets and capacities – generally online	1

Staffing

Recommendations (Ranked by order of popularity)	# of Votes
Offer board trainings on how to write a job description that is flexible and <i>does not inflate degree requirements</i>	6
Do a better job of sharing how you can find meaning, purpose, and create impact via heritage careers	5
Support solutions for housing shortages that make it difficult to hire/retain staff	5
Demonstrate a clear career pathway from high school to heritage jobs	3
Help students see themselves in heritage professions – bring in alumni speakers, demonstrate identity-diversity for those working in heritage so kids can see someone who looks like them	2
Focus on recruiting from the community	1
Create jobs that pay a living wage	1
Lobby to create more space in K-12 curriculum for heritage	1

Full Workshop Notes

Funding

- Funding that incentivizes collaboration
 - removing conflicts of interest
 - encouraging regional partnership
- Incentives for smaller towns rural and smaller tax bases
- Scalable grant applications commiserate with reward
- Streamline grant application portals



- portals
- timelines
- requirements
- Make grants accessible to non-specialist
- Lowering requirements and metrics of success for various tiers of money
 - Fewer reporting requirements for grants under \$5000
- Remove match requirements.
 - Minimize or make optional suggestions of who or how or what matches could be for different grants.
- Regional representatives for one-to-one assistance
- Heritage value proposition and economic development articulation to prove that heritage organizations are a necessity to communities not a luxury.
 - Provides an urgency for funding.
- Fund the mentor corps
- Improve communication and marketing for existing resources keeping the existing.
 - resources updated more.
 - timely communication
 - better social media
- Paid staff in all grants including overhead in all grants
- Toolkit for diversifying funding portfolios
 - best practices
 - how-tos
- Remove stigma and barriers for asking for help
 - advertising resources and training or
 - making them required

Relevancy

- Paid stipends to volunteers
- Offer childcare for family volunteers
 - Mitigate potential barriers to volunteers
- Digital Volunteer opportunities
- Routine access to SHPO
 - Hierarchy of subject matter experts
- Collecting more diverse histories
 - More relevant to everyone
- New Terms to eliminate stigma/nuance to heritage
- Keeping stakeholders in the conversation
 - Open-ness to change
- AI implementation
 - Help with communication
 - Help with daily tasks (social media posts)
 - AI Tech specialist
 - Have conversation with the public
- Focus on the people who care now



- How to make experience community members experts to the younger generation & families
 - How to get history/heritage to be a family-oriented experience
- Collab with city to help with ADA universal accessibility design
 - Accessible to everyone
 - For historic houses/sites
- Popularize local historical storytelling
 - Collab with larger organizations or schools to post these stories
 - Oral history projects
- Cross collaboration with culture keepers as leaders
 - To understand the value that is there
- Involving a wider audience
- Local themed days relevant to heritage
- Collecting data of local heritage
- School involvement as a multi-phase relevancy process
- Invite other culture by acknowledging existing privilege and implicit biases

Programming

- Native inclusion through storytelling and arts & crafts
- Annual Scavenger Hunt using photos for Heritage Month through the city, or other event ideas that give financial deals and/or prizes to visitors if they visit multiple museums in the area
- Training for cultural leader/artist handling to make experience for cultural leaders less transactional when organizations (i.e. libraries, museums) are utilizing their skills for programming (3)
 - Eliminate culture clash
- Sustaining intentional and committed relationships to cultural leaders, organizations, groups, individuals, city, all across board (3)
 - Increased availability, across time, deliberate
 - This could be promoted through fixed, accessible, shared resources throughout the state
- Educational programming (2)
 - There are many skilled educators with a lot of specific heritage knowledge out there and info exists on SHPO website about them – there needs to be a way to bring in or provide access to them
- Small programming steps that will be accessible for organizations with low budgets and capacities (1)
 - e.g. post one photo a day, compare an old photo to a photo of that place/thing/person now
- Expanding network outside of small area or city to find successors, historians or heritage workers with passion and zeal
- Programming continuity – keeping programming in lens of funding and engagement
- Intermediary between schools and organizations, particularly for bilingual services
- Adult education



- Collaborations with landlords involving utilizing open spaces in cities for smaller organizations to use for brick-and-mortar
- Embracing phone culture through programming (2)
 - E.g. “history hikes” - self-guided tours
- Accessible broadcasting like oration podcasts. Need a network to get it to an audience
 - Utilize trend of podcasts/listening to books on tape
- Un-silo heritage leaders to share experiences and organically solve problems through rural/urban collaborations, building a shared identity as Oregonians, co-funded amongst organizations (5)
- Regional/community collaboration through groups like Museums of the Gorge
 - Decreases competition and allows organizations to learn from one another

Staffing

- **Emerging professionals** - it may not be that there’s a lack of emerging professionals (plenty of people are graduating with degrees/experience that’s relevant), it’s a lack of good recruiting
 - Provide a resource guide that helps organizations do a better job of recruiting (where to advertise, how to set salary)
 - Offer Board trainings about how to write a job description and how to be flexible about what you’re looking for
 - Boards should expect that some on-the-job learning needs to happen and shouldn’t only search for their dream candidate
 - Boards should recognize that new hires will take quite a bit of onboarding and training and build this into the job expectations
 - Jobs must provide a living wage or you won’t get anyone
 - Provide support around developing job minimum and desired qualifications so the qualifications bar is not set too high: there seems to be an issue with degree inflation (putting a higher level of education in the job description that is maybe necessary)
 - Federal jobs in particular screen out many qualified people because of degree requirements
 - Campaign to help academic programs adjust their focus so they are preparing students for the skills they’ll actually need in heritage work
 - Many programs seem to focus on preparing students for jobs in academia, which leaves out key practical skills that heritage organizations need
 - Programs should focus more on cultural resource management
- **Housing** – this is a huge issue in recruiting for positions
 - Explore co-locating housing on-site for employees
 - Explore employer-housing models
- **Pipeline** – where/how do you find people to fill heritage jobs?
 - Internships
 - There needs to be more access to funding to cover the cost of internships – could the State provide a pool of money to help cover internships?
 - *Look into UW’s matching funding for internships program



- Don't just recruit from people in certain officially "heritage" degree programs → find people who have the right skills, regardless of what they're studying
 - Internship job descriptions should be clearly aligned with the intern's interests – co-create the job description with the intern
 - Recruit from the local community
 - Hire people who are local
 - Hire people who don't have the skills yet, but have the potential and then invest in their training
 - Message to students that they should be very flexible in the jobs they're looking for (often people in heritage jobs didn't see themselves there when they were going through school, but fell into it and loved it)
 - Explore the "stepping stones" from high school to a heritage job (just like the process of recruiting and training teens for lifeguard positions)
 - Offer paid summer internships
 - Offer career technical credits; explore how heritage might fit into Career Technical Education
 - Offer college credit for high school students who are doing heritage internships/courses
 - Invest in mentorship programs for youth – make sure there are heritage folks represented in the group of mentors so that kids become aware of the possibilities
- **Raising awareness about heritage jobs** – how do we show kids/college students the range of career possibilities in the heritage space?
 - College level: do a better job of bringing in alumni to demonstrate the range of career possibilities
 - Demonstrate the diversity of heritage so kids don't just think heritage means White, Euro-centric history
 - Make sure kids see people like them in the heritage field so they can imagine themselves in such a career
 - Do a better job of communicating how you can find meaning, purpose, and impact in heritage careers (because you probably won't make a lot of money!)
 - Lobby for K-12 teachers to have more space in their curriculum for heritage-related things and field trips



Document 6: La Grande Workshop Summary & Notes

Date: April 26th, 2024

Number of participants: 10

Organizations represented:

Baker City Downtown
Friends of Hot Lake/EOU History dept.
Baker County Assessor
Eastern Oregon Visitors Association
Hoyo
Nez Perce Wallowa Homeland
Liberty Theatre Foundation
LG Historical District
La Grande Main Street Downtown
Ducote Consulting

Key Takeaways from Brainstorm

Funding Recommendations

Participants focused on how funding operates on a structural level. The most popular recommendation was to articulate heritage's value proposition as a political and economic tool. Participants wanted to consider more broadly how funding could be diverted for staff and operations and were interested in funding strategies that prioritized or "triaged" organizations with more dire needs.

Relevancy Recommendations

Participants prioritized six different recommendations similarly. These recommendations mainly underscore the need for organizations to learn, adjust, and expand the ways they participate with both new and existing audiences. Collaboration and education were a large focus for this group, which could be deployed as horizontal or state-led initiatives.

Programming Recommendations

The most popular policy recommendation was a horizontal-driven, but state-led experience-sharing program. Organizations want to be paired with other organizations so they have a partner for discussing shared problems and brainstorming solutions. This group also found articulating heritage's value proposition to be a vital support to their programming. Finally, the group wanted stronger, more meaningful opportunities to network with funders.

Staffing Recommendations

Participants discussed many topics, from a reevaluation of what heritage means to a variety of shared staffing models. A top priority for participants was developing some kind of shared staffing model, which could come from regional collaborations or from a top-down coordinated



effort. The group also liked the idea of implementing a horizontal phone-buddy support system between organizations for troubleshooting. Finally, this group brought attention to how the housing crisis has been affecting their ability to attract and retain staff, which led organizations to consider how heritage organizations could be creatively involved in housing solutions.

Voting Results

Funding

Recommendations (Ranked by order of popularity)	# of Votes
Value Propositions for heritage as a tourism tool	4
Funding for staff, operations, capacity	2
Funding mechanism to act as triage	1
Larger organizations to act as liaison for smaller partners	1
Aggregate and update funding resources website	1
Tax deferral and grants—improve interaction	1
Non-written grant applications	1
Training toolkit for organization to do joint- maintenance	1

Relevancy

Recommendations (Ranked by order of popularity)	# of Votes
Oregon Heritage offers a place for job postings/volunteer opportunities	3
Make local historic storytelling relevant -> openness to change	3
Collaboration with local employers/schools to host “volunteer days”	2
Tech resources -> replicable online “how to” toolkits that are	2
Valuing existing young volunteers; tempering entry-level volunteer experience	2
More inclusive events -> multi-generational events & inclusive to everyone	2

Programming

Recommendations (Ranked by order of popularity)	# of Votes
State-led matching organizations with similar issues to allow them to share experiences	3
Annual reevaluation of mission and vision statement – assess if still relevant, update to reflect goals, trends	1
Connecting organizations and funders better to allow for better fits, organizations to stay focused on their mission	1
Tapping into national networks related to mission	1
Communicate to funders that facilities maintenance/rainy day funding is imperative to keep programming and operations going	1



Staffing

Recommendations (Ranked by order of popularity)	# of Votes
Explore shared-staffing/resource-pooling models, particularly some kind of regional staffing that could support multiple organizations	5
Set up a mentor “on-call” program that can connect organizations with someone to provide advice	3
Provide more funding sources that will cover staffing	2
Improve connections with higher education, especially seeking to recruit people back to their hometowns after college	2
Connect Career Technical Education (CTE) to heritage work so CTE students are exposed to heritage professions	1
Find solutions to address housing shortages for heritage staff	1

Full Workshop Notes

Funding

- Funding for capacity staff and operations
- Divert through property or income tax
- Prove heritage is a strong tourism tool to receive more tourism tax
 - Especially for organizations that offer free or donation entry
- Fuel tax and more attention to Eastern Oregon continue to strengthen rural incentives long term program funding fund for triage organization needs
- identify resources to help liaison small organizations with larger organizations
- How-to toolkit for president business to become private donor
- Aggregate funding resources to website open
- Operational funding grants that will word collaboration
- Bundle construction bids for building and maintenance repairs across multiple organizations
 - A training toolkit as to how to do that
 - Toolkit or explanation one-pager to use those bids as in-kind or match
- Remove grant requirements for bids
- Tax deferral and grants need to play along with each other planner and building department buy-in
 - Prioritize grant-funded projects
 - Support more skilled laborers for specialty historic preservation
- Spotlights for funders via marketing to create a virtuous feedback loop
- Grant matchmaker app
- Scale grant applications to reward size
- Peer-to-peer problem-solving for similar issues
 - Pay the mentorship program
- Subsidizing grant contractors through SHPO



- Make state-wide grant applications less intimidating fewer requirements easier to understand
- Non-written grant applications

Relevancy

- Stigma against younger demographics
 - Possibly deterring interest
- Tech specialist
 - Accessible, expert
- Tech +youth/public engagement = succession planning
 - If we have solid tech accessibility and youth/public engagement, succession planning will come naturally
- Young adults → target audience
 - Should we target younger generations or near-retiree aged people with upcoming capacity
- More inclusive programs
- Young adults + 50's people need to understand the concept of giving back to the community
 - There is an idea with older generations that they have built everything themselves when it's a community effort
- Oregon Heritage job/volunteer postings site
- Changing the "value pitch" to younger generations
 - "This is what your grandparents did..." isn't working
- Open to what youth in interested in
 - Older generations will naturally come along out of curiosity if we have youth engagement
 - Finding shared commonality
 - Multi-generational events
- Open-ness to change
 - Bridge between social media experts (young experts) and heritage experts (elder experts)
 - Tech specialists helps guide orgs through change
 - Being open – finding middle ground so both sides are heard
 - Social media experts and heritage experts
- Young volunteers do exist → shouldn't forget
 - It is discouraging to young volunteers when told that young people don't care
- Collab with local employers/schools to have "volunteer days"
 - Schools: have volunteer hours be required for graduation
- Make local historic storytelling more relevant to everyone
 - Change structure of exhibits to be more relevant to today & what they care about today
 - Give-and-take
 - Older people also need to be interested in what the youth are doing, they can't expect young people to inherently care
 - Open-ness to change



- Tech resources at an affordable cost
 - Replicable “how to” toolkits for success
 - Available to everyone

Programming

- Annual reevaluation of mission – assess if still relevant (1), update to reflect goals, trends
 - Have a vision statement along with a mission statement
- State or bigger organization-led workshopping on mission and vision statement creation and reevaluation
- Rainy day funding imperative to ensure funding for programming (1)
 - Communicate this to funders and state: that programming can’t occur if there isn’t enough rainy-day funding for things like facilities maintenance
- Connecting organizations and funders better to allow for better fits, organizations to stay focused on their mission (1)
- Tapping into national networks (eg League of Historic American Theaters), replicate this (1)
- State-led tools and trainings for marketing and outreach support, particularly for rural areas
- State-led matching organizations with similar issues to allow them to share experiences (3)
- State-led technology distribution and training
 - Local on-call consultants to assist with technology
- Using politics when appropriate: meet with legislature
- Youth programming through regional collaborations - “pay what you can” and leverage public and donor money with this
- Utilize the Oregon Community Foundation
- More accessible networking opportunities – like through Zoom
- Organized manual for programming that provides successful examples, this would be helpful for newer organizations
 - To some extent there is a programming formula, this manual could show some “rules” for organizations to utilize to create their own versions of successful programming
 - Manual could be organized by different types of programming like hybrid, youth, etc.
- Tapping into public events like farmer's market
- Organizational/operational restructuring, an example being getting rid of Executive Director to free up funds
- Tapping into RARE for staffing instead of EDs or coordinators
- Grants that are specifically geared towards staffing

Staffing

- **Funding for staffing** – Increase funding sources for staffing (to help combat Board and volunteer burnout)



- **Training and resources** – organizations, particularly smaller organizations have a difficult time finding out about training and resources
 - Improve communication around what resources are available
 - There should be more centralized and accessible sources of information (State’s website is difficult to navigate)
- **State-level staffing** – Oregon Heritage is understaffed (and this feeds into why communication isn’t better and why many organizations don’t feel supported from the top down)
 - Pressure the legislature to increase funding to Oregon Heritage
- **Explore a shared staffing model** – help small organizations pool resources to have access to shared staff and/or on-call support. Some examples of what this could look like or how to do it include:
 - A research project identifying possible centralized service/shared staffing models
 - Research should clearly identify how to make a model viable: there must be really clear agreement about what members are paying for and how much service they get so nobody feels short-changed/taken advantage of
 - A resource hub where there’s information about insurance needs, administrative and HR needs, tech advice, business planning support, etc.
 - An on-call consultant show can help with special projects, paid for by organizations paying into this service → this could be a good place to start because it could be pretty simple
 - Maybe start with some theaters or museums that are in the same area
 - Shared maintenance/building operations staff – someone who’s on-call for specialized needs
 - Help/guidance on setting up a job-share model (2+ people sharing one position)
 - Create a pooled insurance option: some kind of cooperative program for insurance so it might cost less for individual organizations
 - Create regional staff positions that can serve multiple organizations and offer services like volunteer training
 - *Look into Easter Seals as a staffing resource
- **Mentorship** – do a better job of connecting organizations with mentors who can support them for issues they are encountering
 - (This should be something separate from Mentor Corps – this model doesn’t meet many organizations’ needs)
 - Organizations need someone who does related work who is “on-call” to provide advice/guidance
- **Connections with higher ed** – help organizations better connect with educational programs
 - Plug into classes and students who can support projects for local organizations (could be business-operations related, specific content-knowledge related, etc: anything an organization needs help with)
 - Build a better pipeline for students who go away for college to come back home for a heritage job once they graduate



- Connect Career Technical Education to heritage work so CTE students are exposed to heritage professions
- **Housing** – we need more options to address housing shortages that prevent staff from taking/keeping jobs
 - Help organizations set up successful remote positions; especially provide support around the tech needed to make this feasible
 - NOTE: if locations don't have sufficient broadband, remote is not really a possibility
- **Reframing heritage** – heritage work often gets a reputation as being regulatory, restrictive, and punitive
 - Reframe heritage work as fun and engaging
 - Dispel myths about how the answer is always “no” or that it’s going to cost more money
 - Change the attitude of regulators so they express support rather than negativity

