

# Ohio Historical Society Overview

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The Ohio Historical Society (OHS) is a chartered, not-for-profit corporation that receives state subsidies to manage historical sites and museums. It has operated continuously in the public interest since 1885. In accordance with Ohio Revised Code section 149.30, the society's mission is "to promote a knowledge of history and archeology, especially for Ohio." OHS oversees the operations and maintenance of 62 historic sites and museums, and is custodian for more than 4,700 acres of land and more than 200 buildings statewide. A 21-member OHS Board of Trustees governs the agency's activities, including a fund-raising foundation. OHS employs approximately 500 full and part-time staff.

In addition to operating historical sites, OHS maintains the state archives and a library. Much of the state archives is accessible through the society's website. In fact, the society received approximately 3.5 million records of usage of the online archives and library information last year in addition to walk-in requests for information. There has been an increase in visitors to the library and demand for extending operating hours for the library. The society continues to investigate methods of providing more access.

As we approach Ohio's bicentennial in 2003, OHS and the Ohio Bicentennial Commission continue planning activities to commemorate this bicentennial. The commission is a separate entity from the Historical Society, which serves as the commission's fiscal agent. The budget of OHS provides operating moneys for the Bicentennial Commission. Moneys for programs are funded in the budget of the Controlling Board.

One of the continuing concerns in the society's view is underfunded state mandates. For the last two years, state subsidies have provided approximately 75% of the society's total income; the society continues to object to the subsidies relative to the state's requirements. Within the last several years, the legislature has made strides to cover costs of state requirements and the Ohio Historical Society Review committee convened to analyze the adequacy of OHS' state funding. The review committee recommended that OHS and the state establish a more collaborative relationship, in addition to other recommendations. The review committee's recommendations are discussed in the Facts and Figures section of this analysis.

One of the achievements of OHS in the previous biennium was the creation of step one of the society's strategic plan. In accordance of the plan, OHS will work toward providing better educational services.

## ADDITIONAL FACTS AND FIGURES

Ohio Historical Society Staffing Levels						
Division	1998*	1999*	2000	2001	Estimated	
					2002**	2003**
OHIO HISTORICAL SOCIETY						
DIRECTOR'S OFFICE	--	--	6	7	7	7
DEVELOPMENT/ MEMBERSHIP			4	5	6	7
EXTERNAL RELATIONS	--	--	12	13	13	13
ARCHIVES/LIBRARY	--	--	40	42	42	44
COLLECTIONS/ CURATORIAL	--	--	21	21	21	22
EDUCATION SERVICES*	--	--	35	39	40	41
HAYES PRESIDENTIAL CENTER	--	--	5	5	5	5
HISTORIC PRESERVATION OFFICE	--	--	26	26	27	28
INTERPRETATION/ DESIGN			18	18	18	18
NATIONAL AFRO - AMERICAN MUSEUM	--	--	20	20	20	20
RESEARCH/ PUBLICATIONS	--	--	7	7	7	7
SITE OPERATIONS*	--	--	151	151	153	156
CONTROLLER'S OFFICE	--	--	16	16	16	17
FACILITIES PLANNING	--	--	13	13	13	13
SECURITY	--	--	19	19	19	19
<b>Totals**</b>	<b>395.5</b>	<b>403</b>	<b>393</b>	<b>402</b>	<b>407</b>	<b>417</b>
BICENTENNIAL COMMISSION***	--	--	12.0	17.0	17.0	17.0

\*The staff chart has been reorganized a few times since 1998 and the categories were not consistent.

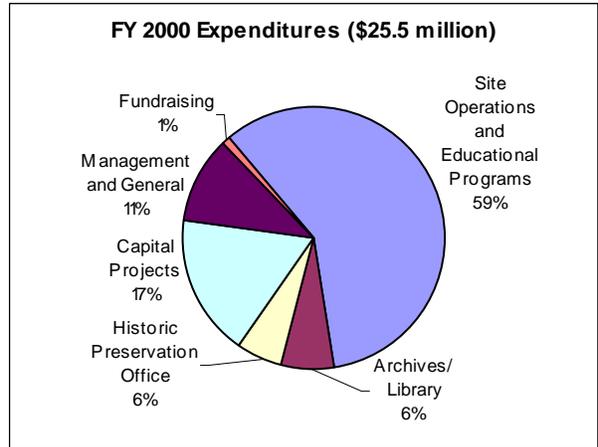
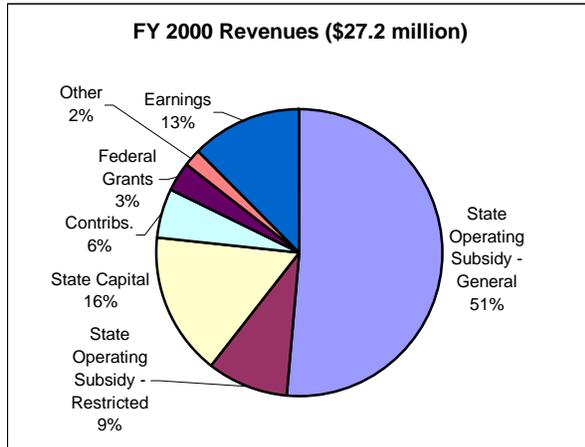
\*\*The total figures for 2002 and 2003 do not reflect potential reductions.

\*\*\*The Bicentennial Commission will probably add staff above 17 in 2002/2003, the number of which is undetermined at this writing.

**VISION 2000: CREATING A FUTURE WORTHY OF OUR PAST (STAGE ONE)**

The Society completed the first stage of its strategic plan. The priorities of the plan focus on the development of high quality educational services, with an emphasis on programs for elementary and secondary students. Another priority of the Society is to cater the presentation of authentic historical collections to a 21<sup>st</sup> century audience. Plans include the improvement of marketing and a focus on the commemoration of Ohio's bicentennial.

**REVENUES AND EXPENDITURES FOR FY 2000**



**OHIO HISTORICAL SOCIETY REVIEW COMMITTEE RECOMMENDATIONS**

The Ohio Historical Society Review Committee, comprising four legislators, two members of the Ohio Historical Society Board of Trustees, and a representative from the Office of Budget and Management, convened to discuss the adequacy of state funding to the Society and to formulate financial alternatives. The report of the Ohio Historical Society Review Committee was required in Am. Sub. H.B. 283 of the 123<sup>rd</sup> G.A. The themes of the Committee's recommendations follow.

- + more effective coordination and communication between the Society and the state
- + establishing an endowment for more stable funding
- + state mandates should meet goals of the Society
- + as an educational entity, the Society should work to enhance efforts to improve elementary reading, teach Ohio History, and establish professional development programs for teachers
- + conduct, with a special analysis of the Ohio Historical Center and its adequacy to meet the needs of the Society; explore alternatives to the State House for providing educational services to school children
- + continue to emphasize public access to archives and library collections
- + the Society should continue to play a major role in the celebration of the state' bicentennial
- + develop better marketing strategies

## ANALYSIS OF EXECUTIVE PROPOSAL

### OHIO HISTORICAL SOCIETY

Single Program Agency

**Purpose** To promote a knowledge of Ohio social, natural, and archaeological history

The following table shows the line items that are used to fund this program series, as well as the Governor's recommended funding levels.

Fund	ALI	Title	FY 2002	FY 2003
GRF	360-501	Operating Subsidy	\$3,941,961	\$3,975,049
GRF	360-502	Site Operations	\$7,471,775	\$7,458,843
GRF	360-503	Ohio Bicentennial Commission	\$3,618,423	\$3,854,595
GRF	360-504	Ohio Preservation Office	\$396,432	\$399,692
GRF	360-505	Afro-American Museum	\$1,093,579	\$1,073,584
GRF	360-506	Hayes Presidential Museum	\$737,711	\$724,222
<b>Total funding: Ohio Historical Society</b>			<b>\$17,259,881</b>	<b>\$17,485,985</b>

Specific programs within the Ohio Historical Society that this analysis will focus on include:

- **OHIO HISTORICAL SOCIETY**
- **BICENTENNIAL CELEBRATION**
- **OHIO HISTORIC PRESERVATION OFFICE**

#### OHIO HISTORICAL SOCIETY

**Program Description:** The state has contracted with OHS to educate the public on Ohio history and archaeology. OHS oversees the operations and maintenance of approximately 62 historic sites and museums, and is custodian for more than 4,700 acres of land and more than 250 buildings statewide. An 18-member OHS Board of Trustees governs the society's activities. The society also stores and maintains the state archives, which in Columbus at the Ohio Historical Center along with administrative operations. The Center also contains a museum of Ohio's natural and social history, as well as an exhibit on archaeology. Some of the projects and issues facing the society are as follows:

- **Archives/Library** - The society has experienced an increase in online visits to the archives and library information and seeks to continue adding collections for electronic access. However, the demand for onsite access remains high and OHS feels its library is understaffed given this demand. Another concern is the inability to make profits from the library, due to the statutory requirement that use of these records is free to the public. Although some users must pay entrance fees to the Center, these charges do not sufficiently maintain the library.
- **Native American Graves Repatriation** – The 1990 federal repatriation act assigns ownership and control of historic (colonial until modern) Native American artifacts and human remains to Native Americans. The act also provides for the protection, inventory, and repatriation of Native American items. When these items are discovered, a reasonable effort must be made to protect the items and notify the appropriate Native American organizations or tribe. Since the early to mid 1990's the Historical Society

has inventoried their collections and will finish cataloging by the end of May 2001. Since most of the society's Native American objects are prehistoric, relatively few items have had to be returned to the appropriate tribe or Native American organization. During the previous biennium, two archaeological staff were hired to comply with this federal act.

**Funding Source:** GRF, non-state sources such as admission prices and grants

**Line Items:** 360-501,360-502, 360-504, 360-505, 360-506

**Implication of the Executive Recommendation:** The recommended levels could result in a reduction in staff and possible site closings. To accomplish the society's main goals of providing educational opportunities and bicentennial-related activities, resources would need to be reallocated. According to the society, unless moneys are available for Historical Society programs from the Controlling Board bicentennial line item (see the budget of the Controlling Board), an estimated 12 to 18 employees could be laid-off.

## **BICENTENNIAL CELEBRATION**

**Program Description:** The year 2003 marks the state's bicentennial and the society and the Ohio Bicentennial Commission will thus prepare special exhibits and programs. The Bicentennial Commission will coordinate the activities of state government and local organizations.

- **Bicentennial Commission** – The Ohio Bicentennial Commission's mission is to plan and coordinate the celebration and commemoration of the 200th anniversary of Ohio statehood, which will seek to involve all Ohioans and provide them with an enhanced understanding and appreciation of their state's heritage and the accomplishments of its citizens. This 51-member commission, established by statute in 1995 and formally organized in fall the of 1996, employs six regional coordinators of bicentennial projects and nine administrative staff. The commission has established the historic markers program, which has erected markers and anticipates creating at least five more by the time of the bicentennial. Another initiative of the commission is painting the bicentennial emblem on a barn in each county. For a further discussion of proposed bicentennial programs administered by the commission, refer to the budget of the Controlling Board.

The executive recommendations include \$3.6 million in FY 2002 and \$3.9 million in FY 2003 for operations of the Bicentennial Commission. The level for FY 2002 is a 199.5% increase over the \$1.2 million estimated spending for FY 2001. FY 2003 levels show an increase of 6.5% over levels for FY 2002. These increases allow for hiring new staff to concentrate regional activities. Subsidies and program funding would be available to the Bicentennial Commission and possibly to the Ohio Historical Society through Controlling Board moneys.

- **Gateway Sites** – To commemorate the bicentennial, the society began marketing its sites by themes, with each theme represented by a primary Gateway site.

The society seeks to complete improvements to the sites by the Bicentennial. Each site

is categorized into at least one theme, such as military history, industrial history, natural history, agricultural history, leadership, and transportation. Gateway sites have been chosen because they are not only historically important, but they are accessible by interstate or near a big population center. Given the executive recommendations, the society has reorganized its strategy to showcase Gateway sites that will be sufficiently renovated by 2003. Earlier renovations of Gateway sites includes those of Campus Martius, complete in 1997, and Fort Ancient, which was completed in March 1998, and Piqua Historical site, which will be complete by spring of 2001. For the next two years, the society will complete renovations on the following sites to showcase them as Gateway sites: Adena, the home of former Governor Worthington in Ross County; Cedar Bog, the natural history showcase site; and Fort Meigs, which showcases military history. The society will need continued operating moneys to fund Gateway sites.

- Bicentennial exhibit – The society also anticipates preparing an exhibit of Ohioans and their experiences for its main exhibit for the bicentennial.

**Funding Source:** GRF, non-state sources such as admission prices and grants

**Line Items:** 360-501, 360-502, 360-503

**Implication of the Executive Recommendation:** The recommended levels would allow for exhibits and special programs to commemorate the state’s bicentennial for the society and for increased operations for the Bicentennial Commission. The commission would gain staff and moneys for other operations. Some of the society’s planned bicentennial projects would not be funded, but the Gateway sites will be showcased.

## **OHIO HISTORIC PRESERVATION OFFICE**

**Program Description:** The Ohio Historic Preservation Office is the official historic preservation agency for the state. The office identifies, and maintains an inventory of, historic sites, and monitors federally aided projects for effects on historic properties. The Preservation office has 26 employees which include archaeologists, historians, and architectural historians.

**Funding Source:** GRF, non-state sources such as federal grants

**Line Items:** 360-504

**Implication of the Executive Recommendation:** The recommended levels would allow for continued services with the possibility of reducing a backlog of historical reviews for federally funded programs.

## PERMANENT AND TEMPORARY LAW

This section describes permanent and temporary law provisions contained in the executive budget that will affect the department's activities and spending decisions during the next biennium.

### **Permanent Law Provisions**

There were no permanent law provisions with fiscal effects on this agency

### **Temporary Law Provisions**

#### **Subsidy Appropriation**

This provision specifies the release of moneys to the Historical Society in quarterly amounts and the requirements for audits.

#### **Hayes Presidential Center**

This section authorizes a potential transfer of operations and/or maintenance of the Hayes Presidential Center to the National Park Service or other United States government agency. The Center is located in Fremont in Sandusky County.

## REQUESTS NOT FUNDED

Information in this section was derived from analysis of the agency's budget submission and information provided by the Governor's Office of Budget and Management concerning the funding of specific agency requests, which may or may not convey precisely the degree to which requests were not funded or whether an agency will or will not proceed with an initiative in whole or in part.

OHIO HISTORICAL SOCIETY						
Fund Line Item	FY 2002 Requested	FY 2002 Recommended	Difference	FY 2003 Requested	FY 2003 Recommended	Difference
GRF 360-501	\$15,179,566	\$3,941,961	(\$11,237,605)	\$16,790,393	\$3,975,049	(\$12,815,344)
GRF 360-502	\$0	\$7,471,775	\$7,471,775	\$0	\$7,458,843	\$7,458,843
GRF 360-503	\$1,238,265	\$3,618,423	\$2,380,158	\$1,269,221	\$3,854,595	\$2,585,374
GRF 360-504	\$0	\$396,432	\$396,432	\$0	\$399,692	\$399,692
GRF 360-505	\$1,254,362	\$1,093,579	(\$160,783)	\$1,379,798	\$1,073,584	(\$306,214)
GRF 360-506	\$0	\$737,711	\$737,711	\$0	\$724,222	\$724,222
<i>Totals</i>	\$17,672,193	\$17,259,881	(\$412,312)	\$19,439,412	\$17,485,985	(\$1,953,427)

The overall budget shows a 7.4% increase from the estimate for FY 2001 to the recommended level for FY 2002. All of this increase is appropriated for the Ohio Bicentennial Commission operations. In this line item, the increase in FY 2002 is \$2.4 million, or 199.5% above the estimated spending for FY 2001. For all other line items, there is a recommended decrease of approximately 3.5%. There is a 1.3% overall increase from FY 2002 to FY 2003, with a 6.5% increase in the Bicentennial Commission line item and slight decreases for all other items.

The Society requested a consolidation of line items for Operating Subsidy (360-501), Site Operations (360-502), Ohio Preservation Office (360-504), and Hayes Presidential Center (360-506). This consolidation was not recommended in the executive budget.

In a supplemental request, moneys were sought to sustain current levels of public access and service and to enhance operations at sites of recent capital improvements. The amount requested for these items was \$2,570,500 in FY 2002 and \$3,960,176 in FY 2003. This request was not funded.

The executive recommendations did not cover core requests and the society has stated that it will have to reduce its staff and close some less visited historic sites.

## LSC Budget Spreadsheet by Line Item, FY 2002 - FY 2003

Fund	ALI	ALI Title	2000	Estimated 2001	Executive 2002	% Change 2001 to 2002	Executive 2003	% Change 2002 to 2003
<b>OHS Historical Society, Ohio</b>								
GRF	360-501	Operating Subsidy	\$ 3,871,946	\$3,964,872	\$ 3,941,961	-0.6%	\$ 3,975,049	0.8%
GRF	360-502	Site Operations	\$ 7,713,699	\$7,831,284	\$ 7,471,775	-4.6%	\$ 7,458,843	-0.2%
GRF	360-503	Ohio Bicentennial Commission	\$ 1,271,155	\$1,208,063	\$ 3,618,423	199.5%	\$ 3,854,595	6.5%
GRF	360-504	Ohio Preservation Office	\$ 418,507	\$426,824	\$ 396,432	-7.1%	\$ 399,692	0.8%
GRF	360-505	Afro-American Museum	\$ 1,113,603	\$1,140,329	\$ 1,093,579	-4.1%	\$ 1,073,584	-1.8%
GRF	360-506	Hayes Presidential Center	\$ 751,229	\$769,258	\$ 737,711	-4.1%	\$ 724,222	-1.8%
GRF	360-508	Historical Grants	\$ 3,017,000	\$600,000	\$ 0	-100.0%	\$ 0	N/A
GRF	360-509	Adena Visitor Center and Grounds	\$ 1,200,000	\$0	\$ 0	N/A	\$ 0	N/A
GRF	360-511	Battle Flags Restoration	\$ 125,000	\$125,000	\$ 0	-100.0%	\$ 0	N/A
<b>General Revenue Fund Total</b>			<b>\$ 19,482,139</b>	<b>\$ 16,065,630</b>	<b>\$ 17,259,881</b>	<b>7.4%</b>	<b>\$ 17,485,985</b>	<b>1.3%</b>
<b>Total All Budget Fund Groups</b>			<b>\$ 19,482,139</b>	<b>\$ 16,065,630</b>	<b>\$ 17,259,881</b>	<b>7.4%</b>	<b>\$ 17,485,985</b>	<b>1.3%</b>

## General Revenue Fund

### GRF 360-501 Operating Subsidy

1998	1999	2000	2001 Estimate	2002 Executive Proposal	2003 Executive Proposal
\$3,806,782	\$3,784,893	\$3,871,946	\$3,964,872	\$3,941,961	\$3,975,049
	-0.6%	2.3%	2.4%	-0.6%	0.8%

**Source:** GRF

**Legal Basis:** ORC 149.30

**Purpose:** Historically, funds have supported the operation of the state's historical museum in Columbus, state archives/library, and numerous state memorials, monuments and historical sites. In the 1995-1997 biennium, a separate line item for Site Operations (360-502) was established (See Site Operations).

### GRF 360-502 Site Operations

1998	1999	2000	2001 Estimate	2002 Executive Proposal	2003 Executive Proposal
\$6,943,246	\$7,070,087	\$7,713,699	\$7,831,284	\$7,471,775	\$7,458,843
	1.8%	9.1%	1.5%	-4.6%	-0.2%

**Source:** GRF

**Legal Basis:** Originally established by Am. Sub. H.B. 117 of the 121st G.A. (previously, these costs were funded through line item 360-501, Operating Subsidy)

**Purpose:** This line item supports operational costs, including personnel, maintenance, and promotions, for 62 historic sites that are the responsibility of OHS and earmarks moneys for specific sites.

### GRF 360-503 Ohio Bicentennial Commission

1998	1999	2000	2001 Estimate	2002 Executive Proposal	2003 Executive Proposal
\$500,000	\$485,000	\$1,271,155	\$1,208,063	\$3,618,423	\$3,854,595
	-3.0%	162.1%	-5.0%	199.5%	6.5%

**Source:** GRF

**Legal Basis:** originally established by Am. Sub. H.B. 117 of the 121st G.A.

**Purpose:** This line item funds planning activities for Ohio's celebration of 200 years of statehood, to be observed in 2003. Current law requires OHS to provide administrative support and assistance to the Bicentennial Commission. This line item also funds earmarked projects related to the bicentennial.

**GRF 360-504 Ohio Preservation Office**

1998	1999	2000	2001 Estimate	2002 Executive Proposal	2003 Executive Proposal
\$342,627	\$338,717	\$418,507	\$426,824	<b>\$396,432</b>	<b>\$399,692</b>
	-1.1%	23.6%	2.0%	<b>-7.1%</b>	<b>0.8%</b>

**Source:** GRF

**Legal Basis:** originally established by Am. Sub. H.B. 117 of the 121st G.A. (previously, these costs were partially funded through line item 360-501, Operating Subsidy; the balance came from project funds from other state agencies)

**Purpose:** This line item provides matching funds for a grant from the National Park Service of approximately \$750,000. Moneys will be used to provide technical assistance to comply with federal preservation requirements for projects seeking federal permits, using federal funding or seeking federal tax breaks.

**GRF 360-505 Afro-American Museum**

1998	1999	2000	2001 Estimate	2002 Executive Proposal	2003 Executive Proposal
\$1,097,300	\$1,088,566	\$1,113,603	\$1,140,329	<b>\$1,093,579</b>	<b>\$1,073,584</b>
	-0.8%	2.3%	2.4%	<b>-4.1%</b>	<b>-1.8%</b>

**Source:** GRF

**Legal Basis:** ORC 149.302 (originally established by Am. H.B. 658 of the 109th G.A.)

**Purpose:** Moneys support the operations of the museum in Wilberforce, Ohio, which is dedicated to the study, preservation, and interpretation of African-American culture through its exhibits, collections, and education and outreach programs. The site has the civil rights movement as a theme and is one of a network of nationwide African-American museums, each having a different theme.

**GRF 360-506 Hayes Presidential Center**

1998	1999	2000	2001 Estimate	2002 Executive Proposal	2003 Executive Proposal
\$735,000	\$734,339	\$751,229	\$769,258	<b>\$737,711</b>	<b>\$724,222</b>
	-0.1%	2.3%	2.4%	<b>-4.1%</b>	<b>-1.8%</b>

**Source:** GRF

**Legal Basis:** Am. Sub. H.B. 215 of the 122nd G.A.

**Purpose:** Moneys are used to help operate the Hayes Presidential Center, in Fremont Ohio. The Center consists of Rutherford B. Hayes' residence, a library, a museum, and the tomb of the president and his wife. OHS operates the Center, which also receives moneys from an endowment fund.

**GRF 360-508 Historical Grants**

1998	1999	2000	2001 Estimate	2002 Executive Proposal	2003 Executive Proposal
\$1,240,000	\$606,250	\$3,017,000	\$600,000	\$0	\$0
	-51.1%	397.6%	-80.1%	-100.0%	N/A

*Source:* GRF

*Legal Basis:* originally established by Am. Sub. H.B. 215 of the 122nd G.A. (the biennial budget bill).

*Purpose:* The line item contains all of the state GRF earmarked moneys passed through the Ohio Historical Society for local historical projects.

**GRF 360-509 Adena Visitor Center and Grounds**

1998	1999	2000	2001 Estimate	2002 Executive Proposal	2003 Executive Proposal
\$0	\$0	\$1,200,000	\$0	\$0	\$0
	N/A	N/A	-100.0%	N/A	N/A

*Source:* General Revenue Fund

*Legal Basis:* Am. H.B. 283 of the 123rd G.A.

*Purpose:* This line item provides moneys for building the Adena Visitor Center and Grounds. Adena was the home of Thomas Worthington, the sixth governor of Ohio. This historic site is located outside Chillicothe.

**GRF 360-511 Battle Flags Restoration**

1998	1999	2000	2001 Estimate	2002 Executive Proposal	2003 Executive Proposal
\$0	\$0	\$125,000	\$125,000	\$0	\$0
	N/A	N/A	0.0%	-100.0%	N/A

*Source:* GRF

*Legal Basis:* Am. Sub. H.B. 283 of the 123rd G.A.

*Purpose:* Provides subsidies for the restoration of historic battle flags.