



MAKING HISTORY TOGETHER

## **Southern Oregon Historical Society Strategic Plan For 2018 and Beyond**

### **VISION:**

*The Southern Oregon Historical Society strives to fill our community with a lively sense of its past. We are committed to sharing the intellectual and material treasures of Southern Oregon that are in our care. We make resources accessible through our Medford History Center, Hanley Farm, and our many outreach efforts. We maintain a continuous tradition of service to Southern Oregon as we have done since 1946.*

### **IDENTITY:**

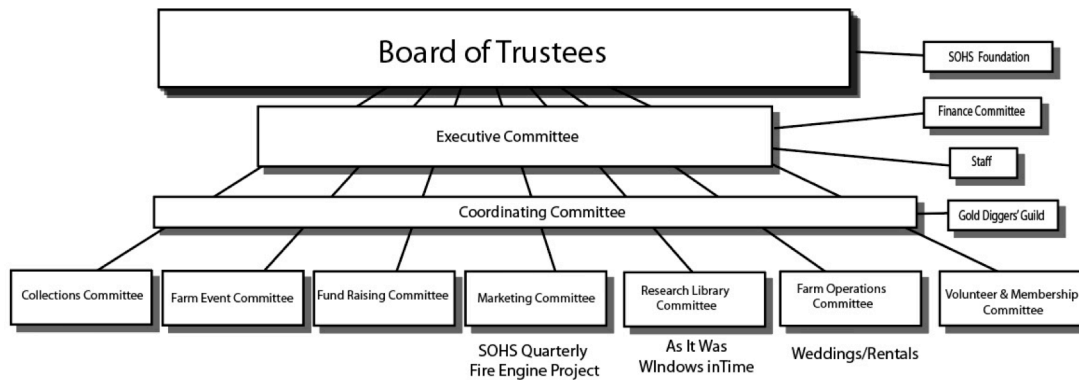
*SOHS is a treasured community resource and a gathering place for learning and celebration of the history and life of our region. SOHS is serious and dependable in matters of historical truth and institutional responsibility whose programs demonstrate that history can be enjoyable and enriching for everyone. SOHS is a well-managed, fiscally sound organization, blessed with a dedicated membership and volunteer base.*

### **STRATEGIC DIRECTION:**

#### **Long Term Goals:**

1. Support the mission of SOHS to make history come alive, by collecting, preserving and sharing the stories and artifacts of our common heritage.
2. Maintain stable and thriving society operation consistent with our mission and vision, increasing our financial reserves and eliminating long-term debt.
3. Increase community awareness of SOHS by building partnerships, expanding our membership, and strengthening volunteer opportunities and training.
4. Offer a balance of quality educational, cultural programs, and access opportunities for our community.
5. Begin implementation of the Hanley Farm Long Range Plan.

*Organizational Chart of the Southern Oregon Historical Society  
January 2018*



*The Southern Oregon Historical Society is a member-based and volunteer-run organization whose operational goals are implemented by seven Standing Committees composed of trustees and trained volunteers. These groups are facilitated by a Coordinating Committee composed of the SOHS President and Standing Committee Chairs. Key elements of the society are our small professional staff, the SOHS Foundation that oversees our endowment, and the Gold Diggers' Guild, our long-serving and dedicated women's support group.*

**Operational Goals for 2018:**

Board of Trustees

1. Finalize a Hanley Farm Conditional Use Permit with Jackson County.
2. Update the SOHS Board Handbook.
3. Provide for training of Board Members and an ongoing trustee recruitment process for 2019 and beyond.
4. Organize Society Members meeting in Spring of 2018.
5. Pursue an alternative site for SOHS Medford operations that will provide space for offices, archives, research library and curatorial work as well as historical exhibits and group gatherings.
6. Begin implementing a plan to address the Society's long-term debt.
7. Assure that SOHS committees are supported through open communications and access to needed resources.

### Collections Committee

1. Textile Project continuation: Continuance and Completion of the Textile Project to stabilize and inventory the storage of all textile artifacts in the General History Collection.
2. Maintenance and oversight of the interiors of SOHS properties housing General History Collection artifacts:
  - i. White City Storage Facility
  - ii. Hanley Farmhouse
  - iii. 19<sup>th</sup> and 20<sup>th</sup> Century Barns at Hanley Farm and other sites housing artifacts at the farm.
  - iv. Beekman House and Beekman Bank collections.
3. Begin an Inventory of Interior Artifacts in the Hanley Farmhouse like the one completed by Tina Reuwsaat at the Beekman House in 2009.
4. Donor Records Inventory and Back Up Project: Devise a long-term plan for inventorying and scanning all original Donor Files housed at the Collections area in the History Center Building. Recommendation to process documents by drawer with a well documented for a very limited number of individuals having access and doing the work to complete the project over time.
5. Maintenance and oversight of outstanding loan agreements with SOHS: Update loan agreements or terminate as needed. Note: Included in this process will be an effort to locate and review the existing agreement/contract with the Powerland Heritage Park in Salem, OR where a steam engine tractor belonging to SOHS General History Collection has been housed for several years. Determine whether this artifact should remain at this location or be returned to Hanley Farm.
6. Exhibits: Explore potential for exhibits of SOHS artifacts at locations to be determined in an effort to bring the collections to appropriate public spaces and venues.
7. Develop at least one new viable community partnership.

### Farm Event Planning Committee

1. Assure that public events at Hanley Farm reflect the historic mission and values of the farm and of the society.
2. Offer eight public events in 2018, serving 4500 visitors and generating \$20,000 in revenue.
3. Open Hanley Farm and House to public viewing supervised by trained docents on Sunday afternoons from Memorial Day through Labor Day.

4. Expand partnerships with community groups.
5. Work closely with the Farm Operating Committee to coordinate scheduling and facilities use.
6. Prepare the 2019 Calendar of events by August 2018.

### Farm Operations Committee

#### A. Agriculture and Historical Facilities

1. Work closely with the SOHS Board of Trustees in implementing the Hanley Farm Long Range Plan Work.
2. Work with the Collections Committee to support a thorough examination of the electrical systems in the Hanley Farmhouse, the Beekman House and the Beekman Bank to evaluate their safety and age. Investigate the possibility of utilizing LED, battery operated lighting systems to remove potential hazards from outdated wiring.
3. Provide liaison and direction to agricultural tenants, coordinating their activities with those of events using the property.

#### B. Weddings/Special Events

1. Maintain the farm and pavilion as an aesthetic venue for prospective clients, keeping the pavilion clear and limiting as far as possible residual materials, props, and farming equipment and debris (to be especially mindful of the aesthetic quality in front of the house and the area surrounding the 19<sup>th</sup> Century barn that are often used as backdrops for wedding ceremonies).
2. Complete the re-purposing of the Granary (shop) to permit efficient, secure storage of all tables, chairs, and support items for weddings and events.
3. Develop facilities to extend the renting season and encourage rental/use of the farm and grounds by smaller groups during the week. These facilities may include a picnic area, stage, and seasonal tent.
4. Develop a working map of grounds that includes all electrical outlets along with associated power ratings/corresponding circuit box and pertinent measurements (e.g. distance between trees in lawn area to aid renters with planning of lighting, dimensions of pavilion including distances to support beams, dimensions of outdoor kitchen, etc.)
5. Complete permitting of water source as a "Public Water" source including maintaining a schedule and log of all required water testing.

6. Increase passive income by developing a collection of items/props to rent (e.g. candle votives, vases, wedding arches, tents etc.)
7. Develop at least one new viable community partnership.

#### Fund Raising Committee

1. Develop a major fundraising event for 2018
2. Support the board in its end-of-year request for funding from members
3. Encourage sponsors, donations and partnerships for events.
4. Prioritize and coordinate SOHS fundraising activities and grants.
5. Inform SOHS committees of grant opportunities and their deadlines. Encourage volunteers to help write those grants.
6. Facilitate debt reduction planning.

#### Marketing Committee

1. Assure that Society Publications and News Releases reflect the standards, mission, and goals of SOHS.
2. Implement use of the revised logo on all society releases.
3. Revise SOHS membership brochure.
4. Oversee the production of the *SOHS Quarterly*.
5. Assist with the Fire Engine project.
6. Support Society fund raising efforts.
7. Expand the SOHS publishing program with a larger SOHS Quarterly, as well as monographs and longer works

#### Membership and Volunteer Committee

1. Increase SOHS general membership by 10% for each of the next three years.
2. Develop strategy to increase long-term membership, with a goal of reaching 1,400 in eight years.
3. Expand number of active volunteers by 5%.

4. Offer volunteer training prior to all major public events.

#### Research Library Committee

1. Form partnership with Jackson County Library District, then focus on meeting the terms of the agreement. Includes opening five days per week plus providing services to libraries and free access.
2. Maintain current levels of *Windows in Time* and *As It Was* programming while adding *Windows in Time* presentations at the Manor. Provide research support for speakers.
3. Recruit and train Library Volunteers to provide three per shift in addition to staff archivist.
4. Update computer equipment and software to improve performance.
5. Partner with community entities to provide front window displays.
6. Foster and coordinate new research.
7. Actively search out and collect new oral histories, photographic collections, and business histories.

### **FISCAL YEAR 2017 FINANCIAL SUMMARY**

#### *Revenues:*

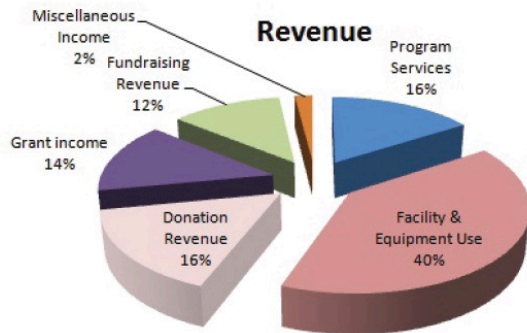
In 2017 the Society significantly reduced its staffing and operational costs. It also began paying the monthly interest on its long-term debt, and negotiated an updated contract with the excellent Kid Time Children's Museum which leases a large part of our History Center building in Medford.

Volunteers will have raised over \$20,000 through public events: the Heritage Plant Sale; Children's Heritage Fair; Living History Days; our first annual Hanley Music Festival; our Scarecrow Festival; Haunted Field Drama; the Wreath Making Workshop, and the upcoming Holidays at Hanley House Tours.

Significant improvement in Hanley Farm revenues occurred from facility rental of this popular wedding and meeting site. Despite the serious cutback in staffing, membership revenue grew, and public program earnings increased.

Gifts and grants continue to be a major support of our Mission.

[2017 Ending Fund Projections]



REVENUE

Program Services	38,688
Facility & Equipment Use	97,076
Donation Revenue	39,289
Grant Income	33,925
Fundraising Revenue	29,571
Miscellaneous Income	4,790
	<hr/>
	243,319

**Expenditures:**

This past year has provided the Society the opportunity to invest in its long-term success. SOHS reconfigured its operations going to a volunteer, member driven organization, and then strategically adding part-time help in key positions. With this significant reduction in costs, the society was able to generate surplus earnings and to invest those funds in long term improvements. These improvements include a significant upgrade in the Hanley Farm sewer and water systems. SOHS also put funds into the development of a long-term facilities improvement plan for Hanley Farm. The money for these investments came from earnings' surpluses and a small amount from our operating reserves (\$8216).

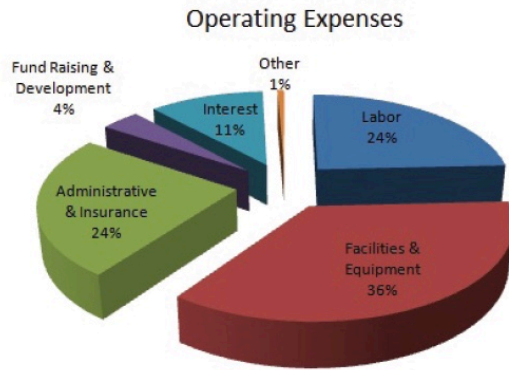
These efforts made it possible for SOHS to protect and maintain its collections, while offering a full range of public service programs. Activities such as the popular *As It Was* public radio features, and the monthly *Windows in Time* lectures were offered to the community at no cost. The Research Library is open three days a week. All of these programs will be continued, and in some cases expanded, in the coming year.

SOHS continued to invest in a small part-time staff that has enabled our dedicated volunteer base to continue a full range of public service and fund-raising programs. Others such as the popular *As It Was* public radio program, and the monthly *Windows in Time* lectures continued to be offered to the community at no cost. All of these programs will be continued, and in some cases expanded, in the coming year.

**2018 and Beyond:**

The 2018 budget projects further improvements in our overall fiscal situation along with an increase in ending-fund balances. Continued capital improvements, technology and facilities investments are anticipated. The society's financial posture will be further strengthened by several partnerships now underway regarding research library services, our ability to mount public exhibits, the agriculture program at Hanley Farm, and a debt-reduction plan.

[2017 Ending Fund Projections]



**OPERATING EXPENSES**

Labor	51,401
Facilities & Equipment	75,714
Administrative & Insurance	51,770
Fundraising & Development	8,083
Interest	23,801
Other	1,344
	212,113
Total Revenue	243,219
Total Operating Expenses	212,113
Net Operating Income	31,206
Capital Expenses	39,422
Cash Flow	(8,216)

**FISCAL YEAR 2017 PROFIT AND LOSS DETAIL**

**Ordinary Income/Expense**

**Income**

<b>40010 · Program Services Revenue</b>	
43510 · Miscellaneous Items for Sale	\$12,382.00
43060 · User Fee - Research Library	\$1,849.00
43000 · Events & Workshops Revenue	\$19,783.00
42000 · Merchandize Sales	\$3,524.00
41000 · Admission Fees	\$1,130.00
	\$38,668.00
<b>Total 40010 · Program Services Revenue</b>	<b>\$38,668.00</b>
<b>40020 · Facility &amp; Equipment Use Revenue</b>	
45100 · Property Rental Income	\$75,584.00
45200 · Utility-operating exp reimburse	\$21,492.00
	\$97,076.00
<b>Total 40020 · Facility &amp; Equipment Use Revenue</b>	<b>\$97,076.00</b>
<b>46000 · Donation Revenue</b>	
46401 · Donations - Restricted	\$17,782.00
46301 · Donations - Other	\$21,367.00



46101 · Donations - Visitor	\$140.00
<b>Total 46000 · Donation Revenue</b>	<b>\$39,289.00</b>
<b>48000 · Grant Revenue</b>	
48001 · Grant Income - Unrestricted	\$33,925.00
<b>Total 48000 · Grant Revenue</b>	<b>\$33,925.00</b>
<b>43050 · Fundraising Revenue</b>	
44750 · Special Fundraising Events	\$20.00
45000 · Membership Dues	\$29,332.00
44500 · Fundraising	\$219.00
<b>Total 43050 · Fundraising Revenue</b>	<b>\$29,571.00</b>
Miscellaneous Income	\$1,374.00
70015 · Interest & Dividend Income	\$406.00
<b>Total Income</b>	<b>\$240,309.00</b>
<b>Gross Profit</b>	<b>\$240,309.00</b>

**Expenses**

<b>60000 · Labor Costs</b>	
60100 · Payroll Expense	
60101 · Wages & Salaries	\$36,262.00
60120 · Payroll Tax Expense	\$2,834.00
60125 · Unemployment Insurance Expense	\$472.00
60130 · Workers Comp. Expense	\$599.00
60140 · Employee Benefits	\$-
<b>Total 60100 · Payroll Expense</b>	<b>\$40,167.00</b>
60400 · Professional Fees	
60410 · Accounting	\$9,724.00
60425 · Development	\$1,510.00
<b>Total 60400 · Professional Fees</b>	<b>\$11,234.00</b>
<b>Total 60000 · Labor Costs</b>	<b>\$51,401.00</b>
<b>62000 · Facility &amp; Equipment Costs</b>	
60080 · Licenses, Permits & Fees	\$4,330.00
60900 · Utilities	\$39,065.00
60500 · Security	\$4,541.00
60475 · Equipment Rental	\$2,263.00
60090 · Maintenance & Repairs	\$60,029.00
60075 · Lease Expense	\$4,524.00
60025 · Cleaning & Supplies Expense	\$307.00
62000 · Facility & Equipment Costs - Other	\$77.00
<b>Total 62000 · Facility &amp; Equipment Costs</b>	<b>\$115,136.00</b>
<b>63000 · Operating Expenses</b>	
68500 · Grant Expense	
60700 · Telecommunications	\$7,579.00

60600 · Office Expense	\$2,956.00
60555 · Materials & Supplies	\$1,403.00
60300 · Printing & Copying	\$4,248.00
60200 · Postage	\$1,457.00
60070 · Insurance	\$30,866.00
60020 · Bank Service Charges	
60022 · Misc. bank fees (NSF, etc.)	\$249.00
60023 · Credit Card Fees	\$1,469.00
60020 · Bank Service Charges - Other	\$218.00
Total 60020 · Bank Service Charges	\$1,936.00
61000 · Misc. expenses	\$1,325.00
Total 63000 · Operating Expenses	\$51,770.00
66000 · Fundraising & Development Costs	
61100 · Fundraising Expenses	\$5,063.00
60050 · Dues, Subscriptions & Meetings	\$1,020.00
60010 · Advertising	\$2,000.00
Total 66000 · Fundraising & Development Costs	\$8,083.00
68000 · Training & Travel	
60830 · Meals and Entertainment	\$595.00
60810 · Travel	\$149.00
Total 68000 · Training & Travel	\$744.00
60077 · Interest Expense	\$23,801.00
61200 · Charitable Contributions	\$600.00
Total Expense	\$251,535.00
Net Ordinary Income	\$(11,226.00)
Other Income/Expense	
Other Income	
70500 · Release from Restriction-Earned	
Kreisman Modular	\$2,691.00
Total 70500 · Release from Restriction-Earned	\$2,691.00
75100 · Unrealized Gain(Loss) on Investment	\$319.00
Total Other Income	\$3,010.00
Net Other Income	\$3,010.00
Profit or Loss	\$(8,216.00)

## 2018 SCHEDULES:

### Hanley Farm Public and Member Events:

February 3 (Saturday):	Plant dig [Membership Event]
March 25 (Sunday)	SOHS Spring Membership Meeting <sup>1</sup>
March 31 (Saturday):	Farm Clean-up Day [Membership Event]
April 27 (Friday):	Set up day for Heritage Plant Sale
April 28-29 (Saturday & Sunday):	Heritage Plant Sale
May 30-June 1 (Wednesday-Friday):	Children's Heritage Fair (School Groups)
July 7-8 (Saturday/Sunday):	Living History Days
August 30 (Thursday):	Scarecrow Preparation Potluck
Sept. 8 (Saturday):	Hanley Music Festival
October 4 (Thursday):	Children's Harvest Festival <sup>2</sup>
October 6-7 (Sat. & Sun.)	Scarecrow Festival
October 13, 14, 20, 21 (Sat. & Sun.)	Haunted Field Drama: "The Lady in Black" <sup>3</sup>
November 3 (Saturday):	Wreath Base Prep [Volunteer Event]
Nov. 23 (Friday):	Set up for Wreath Making
November 24 (Saturday):	Wreath Making
Early December (TBA),	Clean and set up Hanley House for Holidays
December 26 (Wednesday):	Holidays at Hanley Open House

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<sup>1</sup> Placeholder date.

<sup>2</sup> This event is contingent on grant support.

<sup>3</sup> Final dates will not be known until August 1, 2018.

## **Windows in Time History Talks:<sup>4</sup>**

January 3 & 10:	Ron Brown – <i>On the Road Again: Byway Adventures</i>
February 7 & 14: <i>of the</i>	Jeff LaLande – <i>When Timber was King: The Rise and Decline Southern Oregon’s Wood-Products Industry</i>
March 7 & 14:	Patsy Edwards – <i>Heritage Ranch History: The Charley Brothers</i>
April 4 & 11:	Larry Smith -- <i>Goldmines to Woodland Trails: Protecting Historic Jacksonville’s Natural Heritage</i>
May 2 & 9:	Paul Christy <i>The Civil War (with its Effects) comes to Southern Oregon</i>
June 6 & 13:	Dennis Ellingson – <i>Lost Beneath the Waters, Lost Creek Lake Villages</i>
July 11 & 18 <sup>5</sup> :	Todd Kepple - <i>State of Jefferson 1920s Auto Tour</i>
August 1 & 8:	Ben Truwe - <i>NewsWatch 5: Rogue Valley TV News from the 1960s.</i>
September 5 & 12:	Maureen Battistella - <i>Stories of Southern Oregon: Landscape Changed</i>
October 3 & 10:	Joe Peterson - <i>What to do? The 1918 Killer Flu in Medford</i>
November 7 & 14	Jan Wright - <i>Oregon Outcast, Indian Rights Activist, John Beeson.</i>
Dec 5 & 12	Stephanie Butler – <i>Compass, Camera, Castle, and Vine: The Legacy of Peter Britt</i>

## **Rogue Valley Manor Talks**

January 9 (Tues.)	Dennis Powers, <i>Believe It or Not: Stories from Southern Oregon</i>
March 29 (Thur.)	Jeff LaLande, <i>When Timber Was King: The Rise and Decline of Southern Oregon’s Timber Industry</i>

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<sup>4</sup> Noon to 1 pm, Medford Library first Wednesday, Ashland Library second Wednesday of month.

<sup>5</sup> Because of the Wednesday, July 4<sup>th</sup> holiday, the Ashland lecture will be on July 11, and the Medford lecture on July 18.

June 7 (Thurs,)	Paul Fattig, <i>"Madstone: My Uncles, WWI Draft Evaders"</i>
August 9 (Thurs)	Alice Mullaly, <i>Youthful Adventure: A Three Week Trip to Crater Lake by Jacksonville Young People in 1889"</i>
October 16 (Tues)	Jan Wright, John Beeson: <i>Protector of Native People and Spiritualist in the 1850 and 60s</i>
December 4 (Tues)	Maureen Batistella, <i>Power, Politics and Food: Antoinette (Mrs. Mark O. Hatfield Finds Her Own Place.</i>

### **SOHS QUARTERLY Mailing Dates**

Spring Issue: March 15, 2018

Summer Issue: May 24, 2018

Fall Issue: September 6, 2018

Winter Issue: December 13, 2018

### **Meeting Schedule**

Board of Trustees: Last Thursday of month, 4pm

Executive Committee: Second to last Thursday of month, 4 pm

Collections Committee: Third Monday of month, 4 pm

Coordinating Committee: 4 pm (January 17, May 16, July 18, September 19, October 17, and November 21. 4pm

Farm Event Planning Committee: First Monday of month, 4pm.

Farm Operations Committee: TBA

Fund Raising Committee: 4<sup>th</sup> Thursday, 2pm

Gold Diggers' Guild: Third Monday at 10:30 except July, August, and December

Marketing Committee: second Wednesday of month, 5pm

Research Library Committee: Third Monday of month, 2 pm (as needed)

Volunteer and Membership Committee: First Tuesday of month, 10am

Annual Membership Meetings of Society: Spring meeting TBA, September 16 (Sun)

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