

HISTORICAL SOCIETY

GOVERNOR'S BUDGET RECOMMENDATIONS

Source of Funds	FY11 Adjusted Base	FY12 Recommended	% Change Over FY11	FY13 Recommended	% Change Over FY12
GPR	13,498,200	12,178,700	-9.8	13,943,800	14.5
PR-F	1,216,500	1,196,900	-1.6	1,196,900	0.0
PR-O	412,700	381,400	-7.6	375,500	-1.5
PR-S	2,553,000	2,287,200	-10.4	2,287,200	0.0
SEG-O	3,894,400	3,835,500	-1.5	3,835,500	0.0
TOTAL	21,574,800	19,879,700	-7.9	21,638,900	8.8

FULL-TIME EQUIVALENT POSITION SUMMARY

Source of Funds	FY11 Adjusted Base	FY12 Recommended	FTE Change From FY11	FY13 Recommended	FTE Change From FY12
GPR	106.15	99.15	-7.00	99.15	0.00
PR-F	6.36	6.36	0.00	6.36	0.00
PR-O	2.50	0.50	-2.00	0.50	0.00
PR-S	15.00	12.00	-3.00	12.00	0.00
SEG-O	13.53	7.53	-6.00	7.53	0.00
TOTAL	143.54	125.54	-18.00	125.54	0.00

AGENCY DESCRIPTION

The society is governed by a board of curators consisting of 24 individuals elected by the society's members; the Governor or his/her designee; a member of the majority and minority parties from the Senate and Assembly; three members nominated by the Governor with the advice and consent of the Senate; and four additional ex officio curators designated by the society's constitution. The board of curators appoints the director who serves as secretary of the board and the administrative head of the society. The society is organized along functional lines with four operating divisions: Library and Archives, Museums and Historic Sites, Historic Preservation-Public History, and Administrative Services.

The society fulfills its mission through the following major programs:

1. Operates the largest library and archives of North American history (3.7 million volumes) in the world on behalf of Wisconsin citizens, an international array of scholars and the University of Wisconsin, for which the society serves as the North American history library;
2. As the state's records management agency, collects and preserves the archival records of the State of Wisconsin and all of its political and judicial subdivisions, as well as a vast array of unpublished historical records documenting organized labor, social action and reform, Native American history, mass communications media, family and genealogical records, records of important corporations and historical movements, and political papers;

3. Operates the Wisconsin Historical Museum and nine historic sites, which collect, preserve, document and interpret Wisconsin's history, physical heritage and national relevance for Wisconsin citizens and visitors, as well as promote tourism and economic development; a tenth site, Circus World Museum, is owned by the society, but operated under a contract with Circus World Museum Foundation;
4. Provides legally-required services statewide. As the State Historic Preservation Officer, administers the state register of historic places, certifies building projects for federal and state tax credits, reviews federal projects for their effect on historic properties, protects burial sites, and serves as an archaeology service for government agencies on highway and natural resource projects;
5. Provides technical assistance to nearly 400 affiliated historical societies statewide, assists the general public and researchers on a variety of historic preservation and other history-related issues and projects, collaborates with state agencies, including Wisconsin Public Television, the University of Wisconsin System, the Department of Natural Resources and the Department of Tourism; and
6. Operates the Wisconsin Historical Society Press, which publishes books for general readers, school textbooks, curriculum support materials and the *Wisconsin Magazine of History*, and provides assistance to schools in teaching Wisconsin history and through the National History Day program.

MISSION

The society helps people connect to the past by collecting, preserving and sharing stories.

The society engages the public with the excitement of discovery, inspires people with new perspectives on the past and illuminates the relevance of history in our lives today. The society's guiding principles are to reach out and partner with the broadest possible public; present and promote sound and authentic history; share our riches of staff, collections and services in ways that captivate and respect our many audiences; and collect and safeguard evidence of our diverse heritage according to the highest standards of stewardship.

PROGRAMS, GOALS, OBJECTIVES AND ACTIVITIES

Note: Goals, objectives and activities have been modified.

Program 1: History Services

Goal: Increase public access to primary resources and the public record on the history of Wisconsin and North America.

Objective/Activity: Increase the percentage of all collections that are cataloged in on-line catalogs.

Goal: Increase the general public's knowledge and appreciation of the history of Wisconsin.

Objective/Activity: Increase public participation in the historic sites' programming.

Objective/Activity: Increase public participation in the museum programming.

Objective/Activity: Increase the number of new historical books sold or distributed through the Wisconsin Historical Society Press.

Objective/Activity: Increase the distribution of the *Wisconsin Magazine of History*.

Goal: Encourage the rehabilitation and reuse of historic structures throughout the state.

Objective/Activity: Increase the number of buildings rehabilitated using the state and federal historic building rehabilitation tax credit programs.

Goal: Provide increased access to society services and resources.

Objective/Activity: Increase the level of access to society services and resources by increasing the amount of information, resources and applications available on the society's Web site.

Goal: Enhance and improve statewide education curriculum efforts to increase student knowledge of history.

Objective/Activity: Increase student participation and interaction with the society's museum program offerings.

Objective/Activity: Increase statewide student participation in the National History Day program.

Objective/Activity: Increase the number of Wisconsin Historical Society Press student titles and textbooks sold and distributed across the state.

PERFORMANCE MEASURES

2009 AND 2010 GOALS AND ACTUALS

Prog. No.	Performance Measure	Goal 2009	Actual 2009	Goal 2010	Actual 2010
1.	Percentage of all collections cataloged on-line.	43.6%	43.9%	43.9%	44.8%
1.	Total historic sites attendance.	180,000	177,081	182,000	163,206
1.	Total museum attendance.	65,000	74,825	65,000	79,016
1.	Number of buildings receiving tax credits.	150	203	270	193
1.	Number of unique visits to the society's Web site locations.	3,000,000	3,116,766	3,500,000	2,665,922
1.	Attendance of school-age children at the museum.				
	Education units	34,000	46,726	34,500	51,053
	School-age children	25,200	27,516	25,200	28,963

Note: Based on fiscal year.

2011, 2012 AND 2013 GOALS

Prog. No.	Performance Measure	Goal 2011	Goal 2012	Goal 2013
1.	Percentage of all collections cataloged on-line.	44.1%	45.5%	45.7%
1.	Total historic sites attendance. ¹	150,000	164,000	166,000
1.	Total museum attendance.	80,000	82,000	84,000
1.	Number of historical books sold or distributed. ²	46,000	48,500	51,000
1.	Total distribution of <i>Wisconsin Magazine of History</i> . ²	50,250	50,500	50,750
1.	Number of buildings receiving tax credits.	185	195	205
1.	Number of unique visits to the society's Web site locations.	2,750,000	3,000,000	3,150,000
1.	Attendance of school-age children at the museum.			
	Education units	52,000	53,000	54,000
	School-age children	29,400	30,000	30,900
1.	Student participation in National History Day. ²	9,500	10,000	10,500
1.	Number of student titles sold or distributed. ²	15,000	16,000	17,000

Note: Based on fiscal year.

¹A June 2010 tornado that forced the closing of Old World Wisconsin was taken into account when forming these goals.

²Reflects a new objective/activity and corresponding performance measure for the 2011-13 biennium.

HISTORICAL SOCIETY

GOVERNOR'S BUDGET RECOMMENDATIONS

RECOMMENDATIONS

1. Increase Employee Contributions to Pension and Health Insurance
2. Budget Efficiencies
3. Eliminate Long-Term Vacancies
4. Debt Service Reestimate
5. Fuel and Utilities Reestimate
6. Standard Budget Adjustments

ITEMS NOT APPROVED

7. State Preservation Storage Facility IT Infrastructure Equipment
8. State Preservation Storage Facility Librarian Position
9. State Preservation Storage Facility Registrar Position
10. Library and Archives Digital Repository
11. Information Technology Positions
12. Wade House Curator Position
13. Old World Wisconsin Curator Position
14. Marketing
15. Wade House New Building Utilities

**Table 1
Department Budget Summary by Funding Source (in thousands of dollars)**

	ACTUAL FY10	ADJUSTED BASE FY11	AGENCY REQUEST		GOVERNOR'S RECOMMENDATION	
			FY12	FY13	FY12	FY13
GENERAL PURPOSE REVENUE	\$10,923.9	\$13,498.2	\$14,811.2	\$14,999.6	\$12,178.7	\$13,943.8
State Operations	10,839.4	13,413.7	14,726.7	14,915.1	12,094.2	13,859.3
Aids to Ind. & Org.	84.5	84.5	84.5	84.5	84.5	84.5
FEDERAL REVENUE (1)	\$1,084.7	\$1,216.5	\$1,222.5	\$1,222.5	\$1,196.9	\$1,196.9
State Operations	1,084.7	1,216.5	1,222.5	1,222.5	1,196.9	1,196.9
PROGRAM REVENUE (2)	\$3,058.7	\$2,965.7	\$3,025.8	\$3,248.4	\$2,668.6	\$2,662.7
State Operations	3,058.7	2,965.7	3,025.8	3,248.4	2,668.6	2,662.7
SEGREGATED REVENUE (3)	\$4,466.3	\$3,894.4	\$4,002.2	\$4,002.2	\$3,835.5	\$3,835.5
State Operations	4,466.3	3,894.4	4,002.2	4,002.2	3,835.5	3,835.5
TOTALS - ANNUAL	\$19,533.6	\$21,574.8	\$23,061.7	\$23,472.7	\$19,879.7	\$21,638.9
State Operations	19,449.1	21,490.3	22,977.2	23,388.2	19,795.2	21,554.4
Aids to Ind. & Org.	84.5	84.5	84.5	84.5	84.5	84.5

(1) Includes Program Revenue-Federal and Segregated Revenue-Federal

(2) Includes Program Revenue-Service and Program Revenue-Other

(3) Includes Segregated Revenue-Service, Segregated Revenue-Other and Segregated Revenue-Local

**Table 2
Department Position Summary by Program (in FTE positions) (4)**

	ADJUSTED BASE FY11	AGENCY REQUEST		GOVERNOR'S RECOMMENDATION	
		FY12	FY13	FY12	FY13
GENERAL PURPOSE REVENUE	106.15	110.15	112.15	99.15	99.15
FEDERAL REVENUE (1)	6.36	6.36	6.36	6.36	6.36
PROGRAM REVENUE (2)	17.50	16.50	17.50	12.50	12.50
SEGREGATED REVENUE (3)	13.53	13.53	13.53	7.53	7.53
TOTALS - ANNUAL	143.54	146.54	149.54	125.54	125.54

(1) Includes Program Revenue-Federal and Segregated Revenue-Federal

(2) Includes Program Revenue-Service and Program Revenue-Other

(3) Includes Segregated Revenue-Service, Segregated Revenue-Other and Segregated Revenue-Local

(4) All positions are State Operations unless otherwise specified

Table 3
Department Budget Summary by Program (in thousands of dollars)

	ACTUAL FY10	ADJUSTED BASE FY11	AGENCY REQUEST		GOVERNOR'S RECOMMENDATION	
			FY12	FY13	FY12	FY13
1. History services	\$19,533.6	\$21,574.8	\$23,061.7	\$23,472.7	\$19,879.7	\$21,638.9
TOTALS	\$19,533.6	\$21,574.8	\$23,061.7	\$23,472.7	\$19,879.7	\$21,638.9

Table 4
Department Position Summary by Program (in FTE positions) (4)

	ADJUSTED BASE FY11	AGENCY REQUEST		GOVERNOR'S RECOMMENDATION	
		FY12	FY13	FY12	FY13
1. History services	143.54	146.54	149.54	125.54	125.54
TOTALS	143.54	146.54	149.54	125.54	125.54

(4) All positions are State Operations unless otherwise specified

1. Increase Employee Contributions to Pension and Health Insurance

Source of Funds	Agency Request				Governor's Recommendation			
	FY12		FY13		FY12		FY13	
	Dollars	Positions	Dollars	Positions	Dollars	Positions	Dollars	Positions
GPR	0	0.00	0	0.00	-474,500	0.00	-474,500	0.00
PR-F	0	0.00	0	0.00	-25,600	0.00	-25,600	0.00
PR-O	0	0.00	0	0.00	-12,300	0.00	-12,300	0.00
PR-S	0	0.00	0	0.00	-66,200	0.00	-66,200	0.00
SEG-O	0	0.00	0	0.00	-59,200	0.00	-59,200	0.00
TOTAL	0	0.00	0	0.00	-637,800	0.00	-637,800	0.00

The Governor recommends increasing state employee contributions towards pension and health insurance costs. Employees will generally pay 50 percent of the total required retirement contribution, which for calendar year 2011 equals 5.8 percent of salary. The Governor further recommends increasing employee contributions for health insurance from approximately 6 percent of the premium to 12.6 percent of the premium. These modifications are necessary to bring state employee compensation in line with private sector employment and reduce compensation costs.

2. Budget Efficiencies

Source of Funds	Agency Request				Governor's Recommendation			
	FY12		FY13		FY12		FY13	
	Dollars	Positions	Dollars	Positions	Dollars	Positions	Dollars	Positions
GPR	0	0.00	0	0.00	-143,600	0.00	-143,600	0.00
PR-O	0	0.00	0	0.00	-96,100	0.00	-96,100	0.00
TOTAL	0	0.00	0	0.00	-239,700	0.00	-239,700	0.00

The Governor recommends reducing funding, excluding salary and fringe benefits, in most GPR and PR appropriations by 10 percent to create additional efficiencies and balance the budget.

3. Eliminate Long-Term Vacancies

Source of Funds	Agency Request				Governor's Recommendation			
	FY12		FY13		FY12		FY13	
	Dollars	Positions	Dollars	Positions	Dollars	Positions	Dollars	Positions
GPR	0	0.00	0	0.00	-337,300	-7.00	-337,300	-7.00
PR-O	0	0.00	0	0.00	-39,100	-1.00	-39,100	-1.00
PR-S	0	0.00	0	0.00	-126,800	-3.00	-126,800	-3.00
SEG-O	0	0.00	0	0.00	-107,500	-6.00	-107,500	-6.00
TOTAL	0	0.00	0	0.00	-610,700	-17.00	-610,700	-17.00

The Governor recommends eliminating position authority and related funding for positions that have been vacant for longer than 12 months.

4. Debt Service Reestimate

Source of Funds	Agency Request				Governor's Recommendation			
	FY12		FY13		FY12		FY13	
	Dollars	Positions	Dollars	Positions	Dollars	Positions	Dollars	Positions
GPR	0	0.00	0	0.00	-1,180,900	0.00	542,100	0.00
PR-O	0	0.00	0	0.00	-16,700	0.00	-18,200	0.00
TOTAL	0	0.00	0	0.00	-1,197,600	0.00	523,900	0.00

The Governor recommends adjusting the society's base budget to reflect a reestimate of debt service on authorized bonds.

5. Fuel and Utilities Reestimate

Source of Funds	Agency Request				Governor's Recommendation			
	FY12		FY13		FY12		FY13	
	Dollars	Positions	Dollars	Positions	Dollars	Positions	Dollars	Positions
GPR	0	0.00	0	0.00	-186,300	0.00	-146,600	0.00
TOTAL	0	0.00	0	0.00	-186,300	0.00	-146,600	0.00

The Governor recommends adjusting the society's fuel and utilities budget for expected changes in prices and to reflect statistically normal weather conditions.

6. Standard Budget Adjustments

Source of Funds	Agency Request				Governor's Recommendation			
	FY12		FY13		FY12		FY13	
	Dollars	Positions	Dollars	Positions	Dollars	Positions	Dollars	Positions
GPR	1,003,100	0.00	1,005,500	0.00	1,003,100	0.00	1,005,500	0.00
PR-F	6,000	0.00	6,000	0.00	6,000	0.00	6,000	0.00
PR-O	132,900	-1.00	128,500	-1.00	132,900	-1.00	128,500	-1.00
PR-S	-72,800	0.00	-72,800	0.00	-72,800	0.00	-72,800	0.00
SEG-O	107,800	0.00	107,800	0.00	107,800	0.00	107,800	0.00
TOTAL	1,177,000	-1.00	1,175,000	-1.00	1,177,000	-1.00	1,175,000	-1.00

The Governor recommends adjusting the society's base budget for: (a) turnover reduction (-\$156,000 in each year); (b) removal of noncontinuing elements from the base (-\$49,700 in FY12 and -\$54,100 in FY13); (c) full funding of continuing position salaries and fringe benefits (\$1,359,900 in each year); (d) overtime (\$7,600 in each year); (e) night and weekend differential pay (\$12,900 in each year); (f) full funding of lease and directed moves costs (\$2,300 in FY12 and \$4,700 in FY13); and (g) minor transfers within the same alpha appropriation.

ITEMS NOT APPROVED

The following requests are not included in the Governor's budget recommendations for the Historical Society.

Decision Item	Source of Funds	FY12		FY13	
		Dollars	Positions	Dollars	Positions
7. State Preservation Storage Facility IT Infrastructure Equipment	PR-S	0	0.00	170,000	0.00
8. State Preservation Storage Facility Librarian Position	GPR	0	0.00	58,100	1.00
9. State Preservation Storage Facility Registrar Position	GPR	0	0.00	58,100	1.00
10. Library and Archives Digital Repository	PR-S	0	0.00	57,000	1.00
11. Information Technology Positions	GPR	122,700	2.00	163,500	2.00
12. Wade House Curator Position	GPR	43,600	1.00	58,100	1.00
13. Old World Wisconsin Curator Position	GPR	43,600	1.00	58,100	1.00
14. Marketing	GPR	100,000	0.00	100,000	0.00
15. Wade House New Building Utilities	GPR	0	0.00	0	0.00
TOTAL OF ITEMS NOT APPROVED	GPR	309,900	4.00	495,900	6.00
	PR-S	0	0.00	227,000	1.00