

## HISTORICAL SOCIETY

### GOVERNOR'S BUDGET RECOMMENDATIONS

Source of Funds	FY17 Adjusted Base	FY18 Recommended	% Change Over FY17	FY19 Recommended	% Change Over FY18
GPR	15,190,200	18,559,700	22.2	20,220,900	9.0
PR-F	1,313,200	1,386,500	5.6	1,338,700	-3.4
PR-O	982,800	1,576,600	60.4	1,925,800	22.1
PR-S	2,305,200	3,021,600	31.1	3,438,200	13.8
SEG-O	3,788,500	4,678,000	23.5	4,678,000	0.0
TOTAL	23,579,900	29,222,400	23.9	31,601,600	8.1

### FULL-TIME EQUIVALENT POSITION SUMMARY

Source of Funds	FY17 Adjusted Base	FY18 Recommended	FTE Change Over FY17	FY19 Recommended	FTE Change Over FY18
GPR	93.65	100.15	6.50	96.15	-4.00
PR-F	7.86	8.86	1.00	6.86	-2.00
PR-O	3.00	5.00	2.00	5.00	0.00
PR-S	13.25	13.25	0.00	13.25	0.00
SEG-O	11.28	12.78	1.50	12.78	0.00
TOTAL	129.04	140.04	11.00	134.04	-6.00

### AGENCY DESCRIPTION

Founded in 1846, prior to statehood, the society is governed by a board of curators comprised 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 members designated by the society's constitution. The board appoints the director, the administrative head of the agency.

## Historical Society

Both a state agency and a membership organization, the society leverages its state support to generate nearly 40 percent of its annual operating budget through earned income, grants and contributions. Services are delivered through four programmatic divisions:

### ***Division of Library, Archives and Museum Collections***

The society operates the world's largest library and archives dedicated exclusively to North American history 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. Collections include nearly four million books, pamphlets, newspapers, government records, business records, maps, unpublished archival items, personal memoirs, dairies and journals, as well as four million historic photographs. The society's museum collections encompass all of Wisconsin and include over 267,000 artifacts and 375,000 archaeological items.

As the state's records management agency, the society collects and preserves the archival records of the State of Wisconsin and all of its political and judicial subdivisions. The archives holds a vast array of unpublished historical records documenting labor history, social action and reform, Native American history, and political papers from all possible sources.

### ***Division of Museums and Historic Sites***

The society owns and operates the Wisconsin Historical Museum and ten historic sites, which share stories of Wisconsin's physical and cultural heritage. These museums also promote tourism and economic development. The society also owns Circus World Museum, which the Circus World Museum Foundation operates under a lease-management agreement with the society.

### ***State Historic Preservation Office***

The society's State Historic Preservation Office administers the State Register of Historic Places and Wisconsin's portion of the National Register of Historic Places, certifies building projects for federal and state tax credits, reviews federal and state projects for their effect on historic properties, and administers statutes that protect Native American and Euro-American burial sites and cemeteries.

### ***Office of Programs and Outreach***

The Office of Programs and Outreach aims to expand the reach of the society's mission, programs and services to all Wisconsinites through three main functions: field services, the Wisconsin Historical Society Press and education. The office develops curriculum for K-12 classrooms, conducts school visits, administers tours and programming at society locations, creates traveling exhibitions and administers the state National History Day program. It also provides technical assistance to nearly 400 affiliated historical societies statewide and assists the general public and researchers on a variety of historic preservation and other history-related issues and projects. The Wisconsin Historical Society Press publishes the *Wisconsin Magazine of History*, books for general readers, and textbooks and curriculum support materials for teachers and children.

## MISSION

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

## PROGRAMS, GOALS, OBJECTIVES AND ACTIVITIES

Note: Goals, objectives and activities have been modified.

### **Program 1: History Services**

Goal: Expedite the preservation of places of enduring value.

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

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Objective/Activity: Increase the dollars invested in historic properties utilizing the state and federal historic building rehabilitation tax credit programs.

Goal: Enhance the understanding of history through reading, listening and learning.

Objective/Activity: Increase the number of Wisconsin Historical Society Press (WHSP) books sold or distributed.

Objective/Activity: Increase the number of WHSP student titles and textbooks sold and distributed across the state.

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

Objective/Activity: Increase number of local history affiliate consultations.

Goal: Acquire, catalog and preserve collections that sustain our national reputation and provide egalitarian access to research services for seekers of historical information.

Objective/Activity: Increase the percentage of archival, library and artifact collections prepared for transfer to the State Archive Preservation Facility (SAPF).

Objective/Activity: Transfer all prepared archival, library and artifacts collections to SAPF.

Objective/Activity: Increase the number of patrons served.

Objective/Activity: Increase the number of agencies provided with e-records assistance.

Goal: Use physical environments and artifacts to create immersive and engaging learning experiences.

Objective/Activity: Increase total attendance at museums and historic sites.

Objective/Activity: Increase attendance of K-12 students at museums and historic sites.

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**PERFORMANCE MEASURES**

**2015 AND 2016 GOALS AND ACTUALS**

<b>Prog. No.</b>	<b>Performance Measure</b>	<b>Goal 2015</b>	<b>Actual 2015</b>	<b>Goal 2016</b>	<b>Actual 2016</b>
1.	Percentage of archival and library collections prepared for transfer to SAPF.	80%	80%	93%	93%
1.	Number of researchers served.				
	On-site visitation	300,000	337,014	300,000	359,705
	Web views of collections	873,000	910,715	900,000	961,345
1.	Total historic sites attendance.	177,000	180,708	178,000	195,363
1.	Total museum attendance.	75,000	75,721	75,500	72,937
1.	Number of historical books sold or distributed.	45,000	43,433	45,000	47,957
1.	Total distribution of <i>Wisconsin Magazine of History</i> .	49,400	44,239	49,500	45,077
1.	Number of buildings receiving tax credits.	250	280	260	352
1.	Number of unique visits to the society's Web site locations.	2,150,000	1,648,065	2,300,000	2,112,375
1.	Attendance of school-age children at the museum.				
	Education units	53,500	55,223	56,000	56,500
	School-age children	29,000	29,999	29,000	29,500
1.	Student participation in National History Day.	10,500	10,000	11,000	10,000
1.	Number of student titles sold or distributed.	13,000	11,377	13,000	11,210

Note: Based on fiscal year.

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**2017, 2018 AND 2019 GOALS**

<b>Prog. No.</b>	<b>Performance Measure</b>	<b>Goal 2017<sup>1</sup></b>	<b>Goal 2018</b>	<b>Goal 2019</b>
1.	Number of buildings rehabilitated using the rehabilitation tax credit programs. <sup>2</sup>	369	387	406
1.	Rehabilitation tax credit value. <sup>2</sup>	\$74,000,000	\$78,000,000	\$82,000,000
1.	Number of WHSP books sold or distributed.	46,000	47,000	48,000
1.	Number of WHSP student titles and textbooks sold and distributed.	14,000	12,000	12,000
1.	Number of participants in National History Day program.	10,500	10,750	11,000
1.	Number of local history affiliate consultations. <sup>2</sup>	510	560	600
1.	Percentage of archival, library and artifact collections prepared for transfer to SAPF.	98%	100%	N/A
1.	Percentage of all prepared archival, library and artifacts collections transferred to SAPF. <sup>2</sup>	N/A	40%	100%
1.	Number of patrons served. <sup>2</sup>	190,000	190,000	190,000
1.	Number of agencies provided with e-records assistance. <sup>2</sup>	26	28	30
1.	Attendance at museums and historic sites. <sup>2</sup>	270,000	276,000	283,000
1.	K-12 student attendance at museums and historic sites. <sup>2</sup>	47,000	48,000	49,000

Note: Based on fiscal year.

<sup>1</sup>Some goals for 2017 have been revised or removed.

<sup>2</sup>New performance measure for 2017-19 biennium.

## **HISTORICAL SOCIETY**

### **GOVERNOR'S BUDGET RECOMMENDATIONS**

#### **RECOMMENDATIONS**

1. Circus World Museum
2. Human Resources Shared Services Program
3. Federal Funds Reestimate
4. Fuel and Utilities Reestimate
5. Debt Service Reestimate
6. Standard Budget Adjustments

#### **ITEMS NOT APPROVED**

7. State Archive Preservation Facility Positions
8. State Archive Preservation Facility Move Costs

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

	ACTUAL FY16	ADJUSTED BASE FY17	AGENCY REQUEST		GOVERNOR'S RECOMMENDATION	
			FY18	FY19	FY18	FY19
GENERAL PURPOSE REVENUE	\$14,078.0	\$15,190.2	\$18,424.4	\$20,218.8	\$18,559.7	\$20,220.9
State Operations	13,993.5	15,105.7	18,339.9	20,134.3	18,475.2	20,136.4
Aids to Ind. & Org.	84.5	84.5	84.5	84.5	84.5	84.5
FEDERAL REVENUE (1)	\$1,040.1	\$1,313.2	\$1,386.5	\$1,338.7	\$1,386.5	\$1,338.7
State Operations	1,040.1	1,313.2	1,386.5	1,338.7	1,386.5	1,338.7
PROGRAM REVENUE (2)	\$4,253.5	\$3,288.0	\$3,241.1	\$3,242.9	\$4,598.2	\$5,364.0
State Operations	4,253.5	3,288.0	3,241.1	3,242.9	4,598.2	5,364.0
SEGREGATED REVENUE (3)	\$4,060.8	\$3,788.5	\$3,753.0	\$3,753.0	\$4,678.0	\$4,678.0
State Operations	4,060.8	3,788.5	3,753.0	3,753.0	4,678.0	4,678.0
TOTALS - ANNUAL	\$23,432.4	\$23,579.9	\$26,805.0	\$28,553.4	\$29,222.4	\$31,601.6
State Operations	23,347.9	23,495.4	26,720.5	28,468.9	29,137.9	31,517.1
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 Funding Source (in FTE positions) (4)**

	ADJUSTED BASE FY17	AGENCY REQUEST		GOVERNOR'S RECOMMENDATION	
		FY18	FY19	FY18	FY19
GENERAL PURPOSE REVENUE	93.65	95.65	95.65	100.15	96.15
FEDERAL REVENUE (1)	7.86	8.86	7.86	8.86	6.86
PROGRAM REVENUE (2)	16.25	16.25	16.25	18.25	18.25
SEGREGATED REVENUE (3)	11.28	11.28	11.28	12.78	12.78
TOTALS - ANNUAL	129.04	132.04	131.04	140.04	134.04

- (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

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

	ACTUAL FY16	ADJUSTED BASE FY17	AGENCY REQUEST		GOVERNOR'S RECOMMENDATION	
			FY18	FY19	FY18	FY19
1. History services	\$23,432.4	\$23,579.9	\$26,805.0	\$28,553.4	\$29,222.4	\$31,601.6
TOTALS	\$23,432.4	\$23,579.9	\$26,805.0	\$28,553.4	\$29,222.4	\$31,601.6

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

	ADJUSTED BASE FY17	AGENCY REQUEST		GOVERNOR'S RECOMMENDATION	
		FY18	FY19	FY18	FY19
1. History services	129.04	132.04	131.04	140.04	134.04
TOTALS	129.04	132.04	131.04	140.04	134.04

(4) All positions are State Operations unless otherwise specified

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**1. Circus World Museum**

Source of Funds	Agency Request				Governor's Recommendations			
	FY18		FY19		FY18		FY19	
	Dollars	Positions	Dollars	Positions	Dollars	Positions	Dollars	Positions
GPR	0	0.00	0	0.00	500,000	6.50	700,000	6.50
PR-O	0	0.00	0	0.00	250,000	2.00	250,000	2.00
SEG-O	0	0.00	0	0.00	925,000	1.50	925,000	1.50
<b>TOTAL</b>	<b>0</b>	<b>0.00</b>	<b>0</b>	<b>0.00</b>	<b>1,675,000</b>	<b>10.00</b>	<b>1,875,000</b>	<b>10.00</b>

The Governor recommends providing funding and position authority for the Circus World Museum to allow the society to directly operate it as a historic site to preserve state artifacts and collections, increase operational efficiency, and promote tourism.

**2. Human Resources Shared Services Program**

Source of Funds	Agency Request				Governor's Recommendations			
	FY18		FY19		FY18		FY19	
	Dollars	Positions	Dollars	Positions	Dollars	Positions	Dollars	Positions
GPR	0	0.00	0	0.00	0	0.00	0	-4.00
PR-F	0	0.00	0	0.00	0	0.00	0	-1.00
<b>TOTAL</b>	<b>0</b>	<b>0.00</b>	<b>0</b>	<b>0.00</b>	<b>0</b>	<b>0.00</b>	<b>0</b>	<b>-5.00</b>

The Governor recommends creating a human resources shared services program within the Division of Personnel Management at the Department of Administration to consolidate human resources, payroll and benefits functions of most executive branch agencies. Agency staff related to these functions will become Department of Administration employees beginning on July 1, 2018. However, vacant positions will be reallocated from select agencies in FY18 to begin the transition toward a shared services model. See Department of Administration, Item #4.

**3. Federal Funds Reestimate**

Source of Funds	Agency Request				Governor's Recommendations			
	FY18		FY19		FY18		FY19	
	Dollars	Positions	Dollars	Positions	Dollars	Positions	Dollars	Positions
PR-F	0	0.00	0	0.00	63,800	1.00	15,900	0.00
<b>TOTAL</b>	<b>0</b>	<b>0.00</b>	<b>0</b>	<b>0.00</b>	<b>63,800</b>	<b>1.00</b>	<b>15,900</b>	<b>0.00</b>

The Governor recommends adjusting the department's expenditure authority based on reestimates of federal program revenues.

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### 4. Fuel and Utilities Reestimate

Source of Funds	Agency Request				Governor's Recommendations			
	FY18		FY19		FY18		FY19	
	Dollars	Positions	Dollars	Positions	Dollars	Positions	Dollars	Positions
GPR	0	0.00	0	0.00	-270,300	0.00	-258,400	0.00
TOTAL	0	0.00	0	0.00	-270,300	0.00	-258,400	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.

### 5. Debt Service Reestimate

Source of Funds	Agency Request				Governor's Recommendations			
	FY18		FY19		FY18		FY19	
	Dollars	Positions	Dollars	Positions	Dollars	Positions	Dollars	Positions
GPR	0	0.00	0	0.00	1,454,400	0.00	1,653,800	0.00
PR-O	0	0.00	0	0.00	346,200	0.00	695,400	0.00
TOTAL	0	0.00	0	0.00	1,800,600	0.00	2,349,200	0.00

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

### 6. Standard Budget Adjustments

Source of Funds	Agency Request				Governor's Recommendations			
	FY18		FY19		FY18		FY19	
	Dollars	Positions	Dollars	Positions	Dollars	Positions	Dollars	Positions
GPR	2,459,800	0.00	4,124,400	0.00	1,685,400	0.00	2,935,300	0.00
PR-F	73,300	1.00	25,500	0.00	9,500	0.00	9,600	0.00
PR-O	-2,400	0.00	-2,400	0.00	-2,400	0.00	-2,400	0.00
PR-S	-44,500	0.00	-42,700	0.00	716,400	0.00	1,133,000	0.00
SEG-O	-35,500	0.00	-35,500	0.00	-35,500	0.00	-35,500	0.00
TOTAL	2,450,700	1.00	4,069,300	0.00	2,373,400	0.00	4,040,000	0.00

The Governor recommends adjusting the society's base budget for: (a) turnover reduction (-\$174,400 in each year); (b) full funding of continuing position salaries and fringe benefits (-\$588,400 in each year); (c) reclassifications and semiautomatic pay progression (\$5,200 in each year); (d) overtime (\$7,300 in each year); (e) night and weekend differential pay (\$12,400 in each year); and (f) full funding of lease and directed moves costs (\$3,111,300 in FY18 and \$4,777,900 in FY19).

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**ITEMS NOT APPROVED**

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

Decision Item	Source of Funds	FY18		FY19	
		Dollars	Positions	Dollars	Positions
7. State Archive Preservation Facility Positions	GPR	74,400	2.00	99,200	2.00
8. State Archive Preservation Facility Move Costs	GPR	700,000	0.00	805,000	0.00
<b>TOTAL OF ITEMS NOT APPROVED</b>	<b>GPR</b>	<b>774,400</b>	<b>2.00</b>	<b>904,200</b>	<b>2.00</b>

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