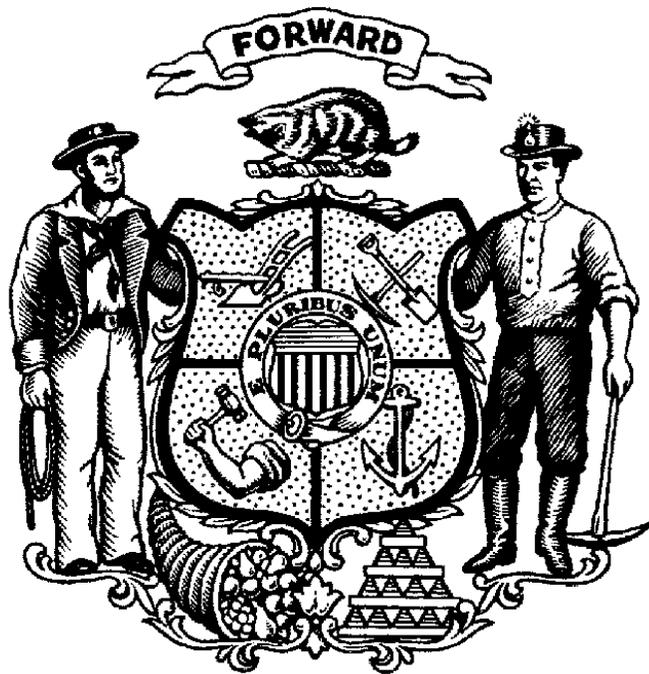


State of Wisconsin

Historical Society



Agency Budget Request

2019 – 2021 Biennium

September 17, 2018

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WISCONSIN
HISTORICAL
SOCIETY

September 17, 2018

The Honorable Scott Walker
Governor
115 East, State Capitol
Madison, WI 53702

Dear Governor Walker:

The Wisconsin Historical Society (Society) is pleased to submit its 2019-2021 biennial budget request. During the 2019-21 biennium, the Society will strive to improve and increase the services provided to the citizens of Wisconsin, expand access to our world-class collections, and maintain our status as a national leader among state history organizations.

To that end, the Society prioritizes three major items in this budget request:

- 1) Operational efficiencies and improvements that allow for the responsible stewardship of taxpayers' money;
- 2) Safety and security of members of the public, including school children and families, and Society employees and volunteers; and
- 3) Improved education and expanded access to all Wisconsin students and schools.

I respectfully request your consideration of the Society's 2019-21 biennial budget request. Thank you for your continued support of the Society's mission to connect people to the past by collecting, preserving, and sharing stories.

Sincerely,

Christian W. Overland
The Ruth and Hartley Barker Director

AGENCY DESCRIPTION

Founded in 1846, two years prior to statehood, the Wisconsin Historical 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.

The Society is among the nation's oldest, most active, and diverse state historical organizations. Its world-class collections are valued at over \$1 billion. Over three million people connect to the past each year through the Society's resources, programs, and services. Its partnership with the University of Wisconsin-Madison and other University of Wisconsin System schools provides unique and unmeasured access to rare research collections. The Society serves Wisconsin citizens throughout the state through its 12 historic sites and museums, nearly 400 local affiliates, the State Historic Preservation Office, a network of 13 area research centers, and its traveling exhibitions and programs.

Both a state agency and a membership organization, the Society leverages its state support to generate nearly 40% 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 its North American history library. Its extensive 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.

In partnership with the Department of Administration and the Wisconsin Veterans Museum, the Society operates a new 188,000 square foot State Archive Preservation Facility, providing state-of-the-art environmental and physical security for Wisconsin's most important historical and cultural resources.

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 eleven historic sites, which share stories of Wisconsin's physical and cultural heritage. They promote tourism and economic development throughout Wisconsin. The museums and sites include:

- *Black Point Estate & Gardens*, overlooking Geneva Lake, the summer home for Chicago beer baron Conrad Seipp and four generations of his descendants.
- *Circus World*, an internationally recognized and respected 64-acre historic and educational institution that preserves the history of the circus at the site of the original winter quarters of the Ringling brothers in Baraboo. Though the Society has owned this site and its collections since 1959, it assumed the overall operations of the complex in January 2018.
- *First Capitol* in Belmont, the first capitol of the Wisconsin Territory.
- *H.H. Bennett Studio* in Wisconsin Dells, a historic photography studio important in the development of landscape photography and photo journalism that promoted the Wisconsin Dells area as a premier vacation destination.
- *Madeline Island Museum* in La Pointe, a facility that makes cultural connections from the Ojibwe to European fur traders and tells the stories of the island's communities and Lake Superior.
- *Old World Wisconsin* in Eagle, a 600-acre outdoor museum that explores rural Wisconsin through more than 60 historic structures including eight ethnic farms and an 1880s village filled with immersive activities for visitors of all ages.
- *Pendarvis* in Mineral Point, over 48-acres of historic homes, hiking trails, and pathways that preserve the history of Cornish settlement and Wisconsin's lead-mining heyday in the early 19th century.
- *Reed School* in Neillsville, a schoolhouse built in 1915 that is typical of the more than 6,000 one-room schoolhouses that once dotted the landscape of rural Wisconsin.
- *Stonefield* in Cassville, the former country estate of Wisconsin's first governor and a vast collection of antique farm implements and machinery that tells the state's rich agricultural history.
- *Villa Louis* in Prairie du Chien, an elegant and stylish 19th century Victorian country mansion with extensive grounds and outbuildings on the banks of the Mississippi River.
- *Wade House* in Greenbush, a historic half way house that was a regular stop for stagecoach lines. The site also features nearly 100 horse-and-hand-drawn carriages and vehicles that span the period from 1870 to 1915 – when horse transportation ruled.
- *Wisconsin Historical Museum*, on the Capitol Square in Madison, which uses important artifacts from the Society's vast history collections to tell the story of the state.

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. It also 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 American Indian 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 including the popular 4th grade history textbook, *Wisconsin: Our State, Our Story*.

MISSION

The Wisconsin Historical Society connects people 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: Educate Wisconsin residents, property owners, and stakeholders on Wisconsin's archaeological, maritime, and built environment resources.

Objective/Activity: Facilitate Wisconsin's historic preservation programs under Wis. Stat. Chapter 44 including private investment 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: Publish and distribute highly valued and widely read Wisconsin Historical Society Press (WHSP) books sold to general audiences.

Objective/Activity: Distribute highly valued WHSP student titles and textbooks to schools and students.

Objective/Activity: Provide transformative history educational experiences for middle school and high school students through the National History Day program.

Objective/Activity: Provide assistance and support to local history affiliate organizations and support to local heritage and community groups through consultations, programming, and educational services.

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

Objective/Activity: Acquire and document history through current collecting policies and collection plans.

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

Objective/Activity: Provide valued service and unparalleled access to the Wisconsin Historical Society's research collection to patrons and visitors.

Objective/Activity: Provide assistance with electronic records to state agencies.

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

Objective/Activity: Deliver quality, engaging, entertaining, and educational experiences for visitors of all ages that result in lasting and inspirational memories and connections to Wisconsin History.

Objective/Activity: Provide enriching educational experiences for school children that meet Wisconsin instructional standards.

Objective/Activity: Increase safety and security at WHS facilities and reduce deferred maintenance.

Goal: Replace Wisconsin Historical Museum with new 21st century museum.

Objective/Activity: Prepare and collect stories for new museum.

Objective/Activity: Engage citizenship of Wisconsin to develop relevant guest experience.

Objective/Activity: Close current museum and transfer artifacts to State Archive Preservation Facility.

Objective/Activity: Develop facility and realize capital funding requirements.

PERFORMANCE MEASURES

2017 AND 2018 GOALS AND ACTUALS

Prog. No.	Performance Measure	Goal 2017	Actual 2017	Goal 2018	Actual 2018
1.	Number of buildings rehabilitated using the rehabilitation tax credit programs.	369	313	387	307
1.	Rehabilitation tax credit value.	\$74,000,000	\$103,829,683	\$78,000,000	\$69,605,873
1.	Number of Wisconsin Historical Society Press (WHSP) trade books sold or distributed through all channels.	46,000	57,483	47,000	51,402
1.	Number of WHSP student titles and textbooks sold and distributed.	14,000	16,625	12,000	9,385
1.	Number of participants in National History Day program.	10,500	19,104	10,750	16,523
1.	Number of local history affiliate consultations.	510	558	560	656
1.	Percentage of archival, library, and artifact collections prepared for transfer to the State Archive Preservation Facility (SAPF).	98%	89%	100%	99%
1.	Percentage of all prepared archival, library, and artifacts collections transferred to SAPF.	N/A	N/A	40%	28%
1.	Number of patrons served.	190,000	176,797	190,000	175,148
1.	Number of agencies provided with e-records assistance.	26	25	28	22
1.	Attendance at museums and historic sites.*	270,000	254,482	278,000	272,165
1.	K-12 student attendance at museums and historic sites.*	47,000	51,817	48,000	54,764

Note: Based on fiscal year.

*Includes Circus World attendance from January 1, 2018 – June 30, 2018

2019, 2020 AND 2021 GOALS

Prog. No.	Performance Measure	Goal 2019	Goal 2020	Goal 2021
1.	Number of buildings rehabilitated using the rehabilitation tax credit programs.	310	310	310
1.	Rehabilitation tax credit value.	\$70,000,000	\$70,000,000	\$70,000,000
1.	Number of Wisconsin Historical Society Press (WHSP) books sold or distributed through all channels.	46,500	47,000	48,000
1.	Number of WHSP student titles and textbooks sold and distributed.	12,500	14,500	15,000
1.	Number of participants in National History Day program.	17,00	17,250	17,500
1.	Number of local history affiliate consultations.	700	750	750
1.	People engaged in new museum development process.^	1,600	2,000	2,400
1.	Percentage of all prepared archival, library, and artifacts collections transferred to SAPF (includes artifacts at WI Historical Museum).	100%	N/A	N/A
1.	Number of collection donations (donor transactions).^	1,420	1,500	1,580
1.	Number of patrons served through State Archives and North American History Library.	190,000	190,000	190,000
1.	Number of agencies provided with e-records assistance.	26	28	30
1.	Number of local governments served via in-person consultations.^	15	20	25
1.	Attendance at museums and historic sites.*	273,000	275,000	277,000
1.	K-12 student attendance at museums and historic sites.*	54,000	55,000	56,000
1.	Unique visits to website content.^	4,800,000	4,800,000	4,800,000
1.	Total Wisconsin Historical Society members.^	12,800	13,000	13,500

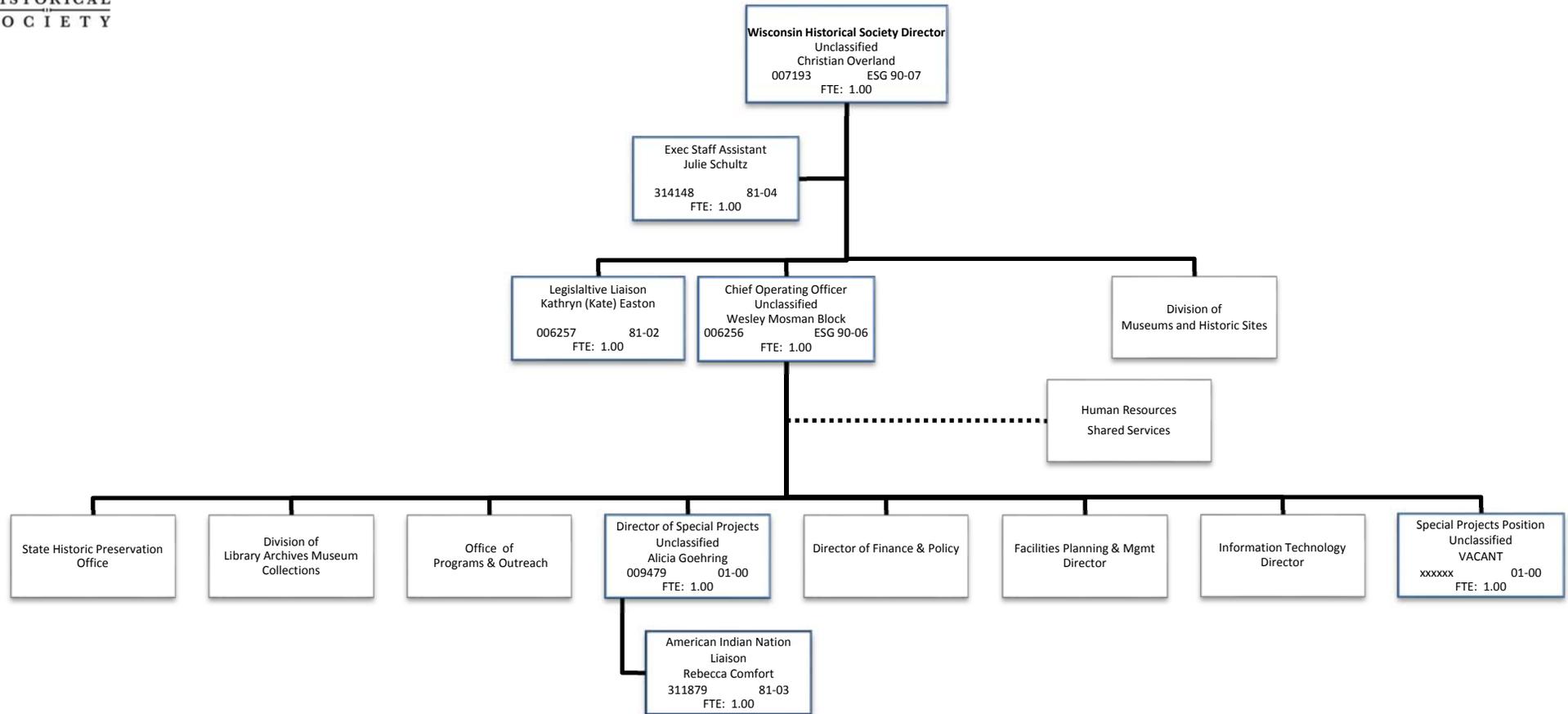
Prog. No.	Performance Measure	Goal 2019	Goal 2020	Goal 2021
1.	Value of deferred maintenance at WHS facilities.^	\$11,400,000	\$10,900,000	\$10,400,000

Note: All metrics based on fiscal year.

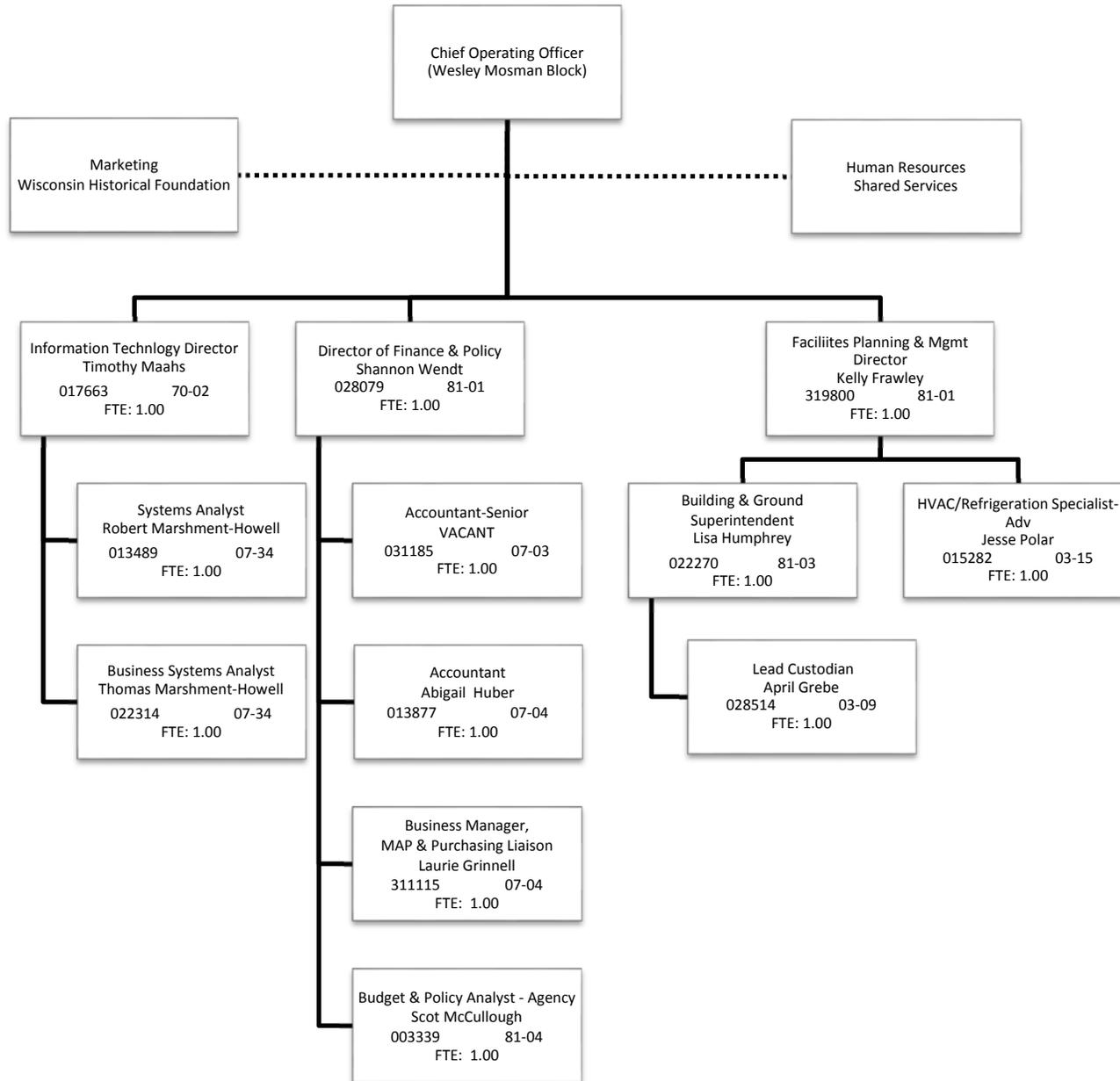
*Includes Circus World Museum attendance for entire fiscal year and assumes Wisconsin Historical Museum closing in Fiscal Year 2020.

^New metric for 2019-2021 biennium.

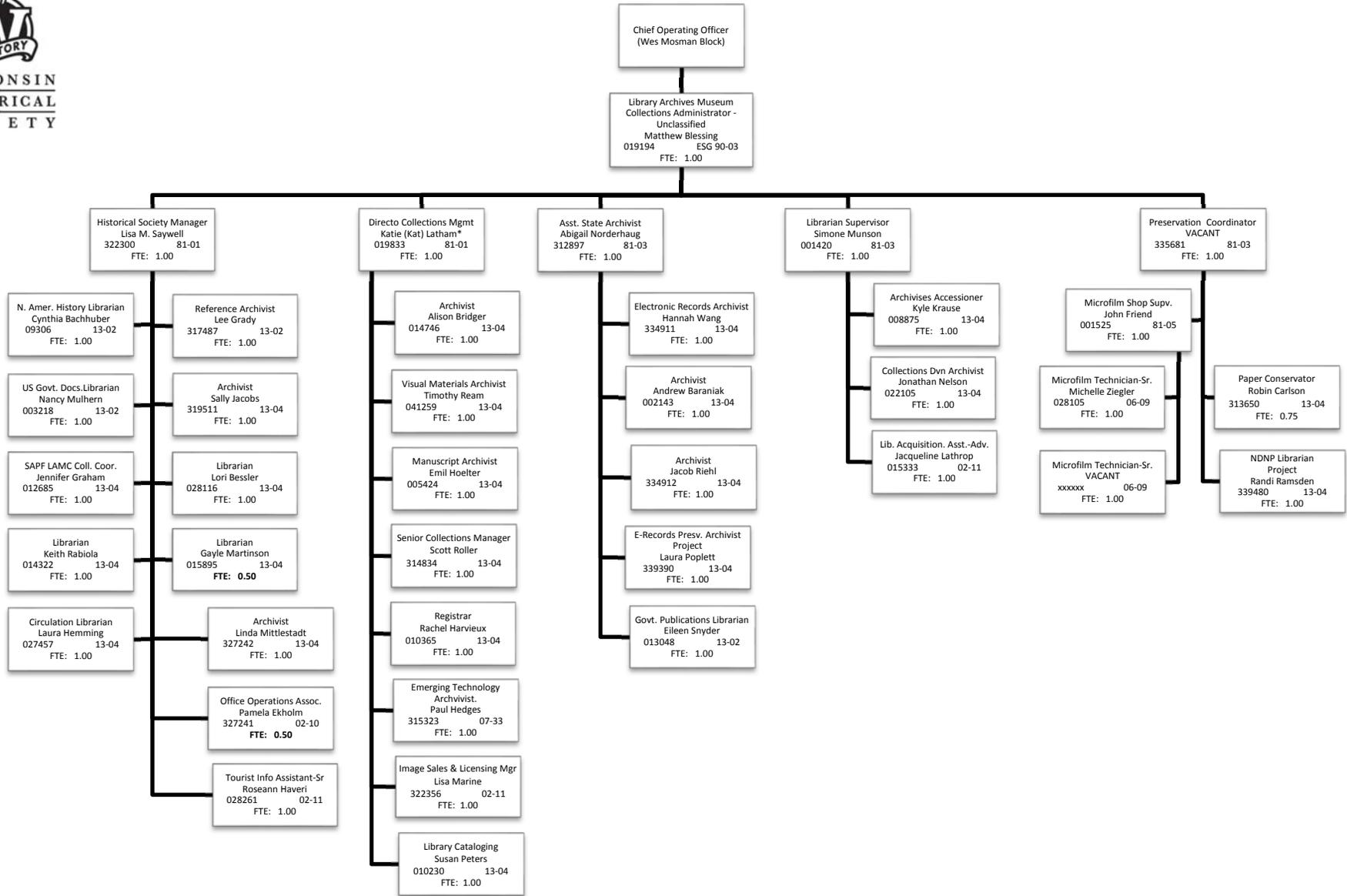
Wisconsin Historical Society – Director’s Office



Wisconsin Historical Society – Division of Administrative Services



Wisconsin Historical Society – Division of Library Archives and Museum Collections

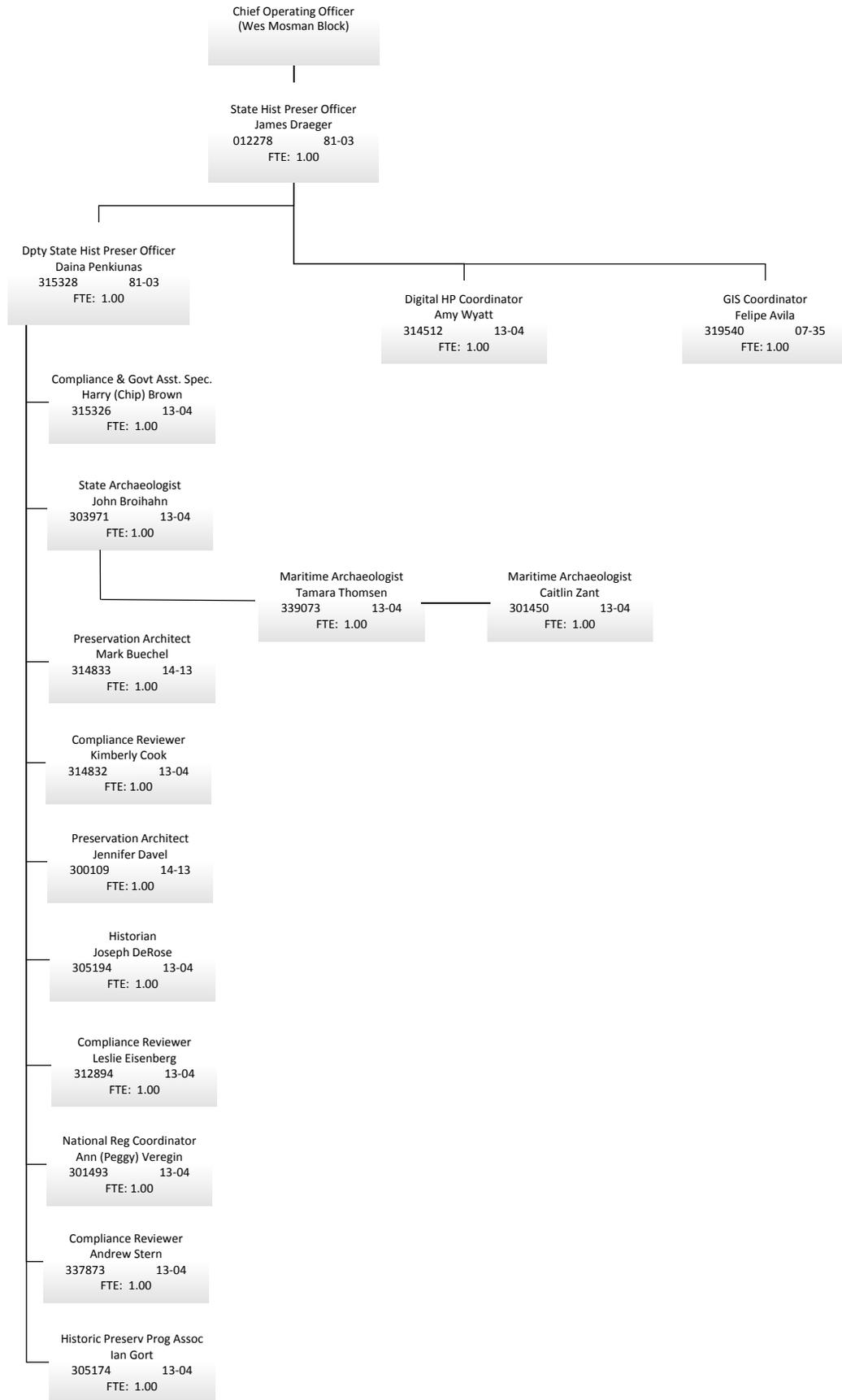


*starting October 1, 2018

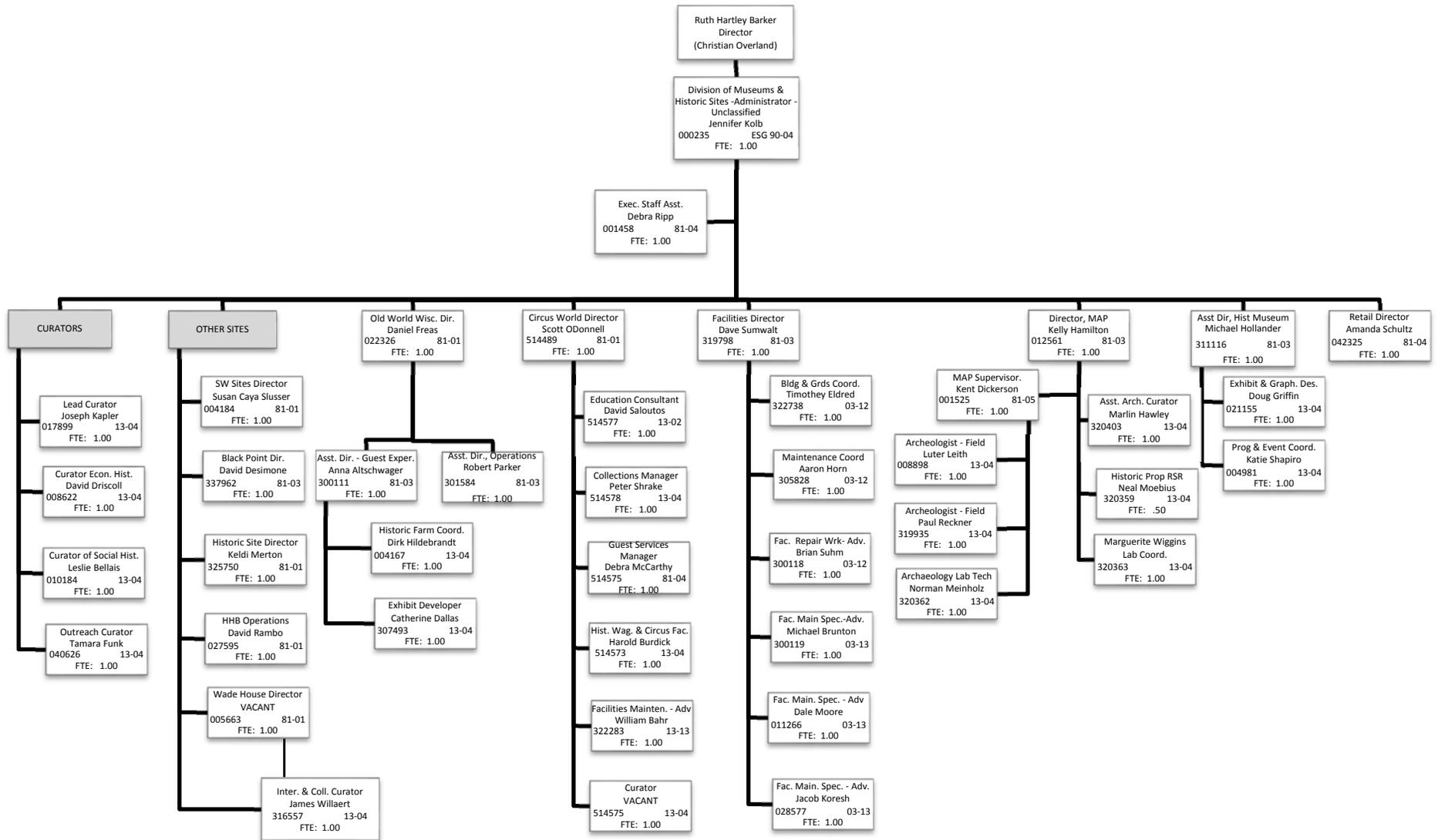
Last Updated: September 5, 2018



Wisconsin Historical Society – State Historic Preservation Office



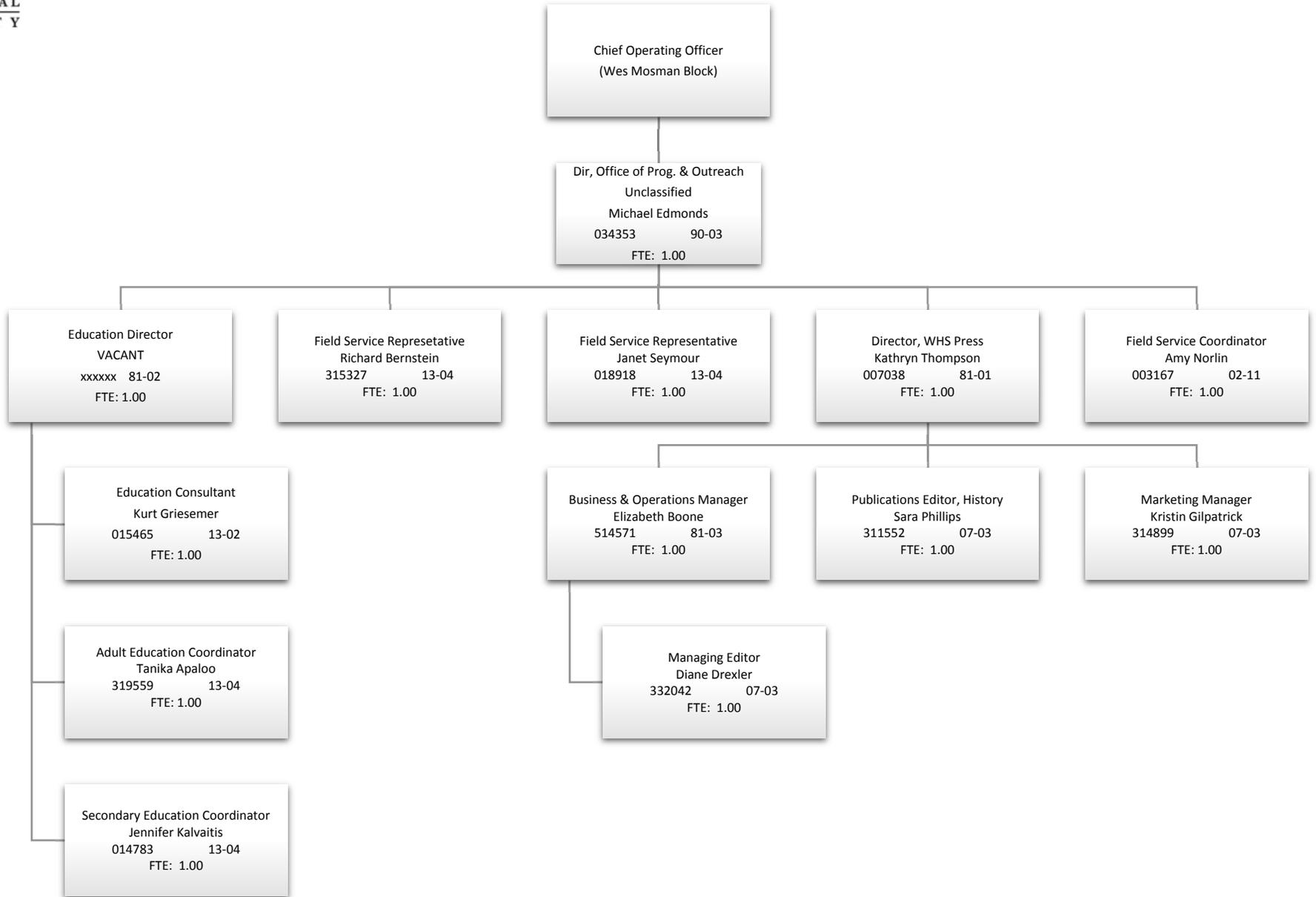
Wisconsin Historical Society – Division of Museums and Historic Sites





Wisconsin Historical Society – Office of Programs & Outreach

WISCONSIN
HISTORICAL
SOCIETY



Last Updated: September 5, 2018

Agency Total by Fund Source

Historical Society

1921 Biennial Budget

		ANNUAL SUMMARY						BIENNIAL SUMMARY			
Source of Funds		Prior Year Total	Adjusted Base	1st Year Total	2nd Year Total	1st Year FTE	2nd Year FTE	Base Year Doubled (BYD)	Biennial Request	Change From (BYD)	Change From BYD %
GPR	A	\$84,500	\$84,500	\$84,500	\$84,500	0.00	0.00	\$169,000	\$169,000	\$0	0.0%
GPR	S	\$17,756,185	\$20,029,600	\$20,133,300	\$20,098,800	115.65	115.65	\$40,059,200	\$40,232,100	\$172,900	0.4%
Total		\$17,840,685	\$20,114,100	\$20,217,800	\$20,183,300	115.65	115.65	\$40,228,200	\$40,401,100	\$172,900	0.4%
PR	S	\$4,141,163	\$3,382,500	\$4,474,100	\$4,511,700	27.75	27.75	\$6,765,000	\$8,985,800	\$2,220,800	32.8%
Total		\$4,141,163	\$3,382,500	\$4,474,100	\$4,511,700	27.75	27.75	\$6,765,000	\$8,985,800	\$2,220,800	32.8%
PR Federal	S	\$1,245,785	\$1,356,500	\$1,400,100	\$1,382,800	8.86	8.86	\$2,713,000	\$2,782,900	\$69,900	2.6%
Total		\$1,245,785	\$1,356,500	\$1,400,100	\$1,382,800	8.86	8.86	\$2,713,000	\$2,782,900	\$69,900	2.6%
SEG	S	\$4,129,691	\$4,704,900	\$4,860,500	\$4,860,500	33.28	33.28	\$9,409,800	\$9,721,000	\$311,200	3.3%
Total		\$4,129,691	\$4,704,900	\$4,860,500	\$4,860,500	33.28	33.28	\$9,409,800	\$9,721,000	\$311,200	3.3%
Grand Total		\$27,357,324	\$29,558,000	\$30,952,500	\$30,938,300	185.54	185.54	\$59,116,000	\$61,890,800	\$2,774,800	4.7%

Agency Total by Program

245 Historical Society

1921 Biennial Budget

Source of Funds	ANNUAL SUMMARY						BIENNIAL SUMMARY			
	Prior Year Actual	Adjusted Base	1st Year Total	2nd Year Total	1st Year FTE	2nd Year FTE	Base Year Doubled (BYD)	Biennial Request	Change From (BYD)	Change From BYD %
01 HISTORY SERVICES										
Non Federal										
GPR	\$17,840,685	\$20,114,100	\$20,217,800	\$20,183,300	115.65	115.65	\$40,228,200	\$40,401,100	\$172,900	0.43%
A	\$84,500	\$84,500	\$84,500	\$84,500	0.00	0.00	\$169,000	\$169,000	\$0	0.00%
S	\$17,756,185	\$20,029,600	\$20,133,300	\$20,098,800	115.65	115.65	\$40,059,200	\$40,232,100	\$172,900	0.43%
PR	\$4,141,163	\$3,382,500	\$4,474,100	\$4,511,700	27.75	27.75	\$6,765,000	\$8,985,800	\$2,220,800	32.83%
S	\$4,141,163	\$3,382,500	\$4,474,100	\$4,511,700	27.75	27.75	\$6,765,000	\$8,985,800	\$2,220,800	32.83%
SEG	\$4,129,691	\$4,704,900	\$4,860,500	\$4,860,500	33.28	33.28	\$9,409,800	\$9,721,000	\$311,200	3.31%
S	\$4,129,691	\$4,704,900	\$4,860,500	\$4,860,500	33.28	33.28	\$9,409,800	\$9,721,000	\$311,200	3.31%
Total - Non Federal	\$26,111,539	\$28,201,500	\$29,552,400	\$29,555,500	176.68	176.68	\$56,403,000	\$59,107,900	\$2,704,900	4.80%
A	\$84,500	\$84,500	\$84,500	\$84,500	0.00	0.00	\$169,000	\$169,000	\$0	0.00%
S	\$26,027,039	\$28,117,000	\$29,467,900	\$29,471,000	176.68	176.68	\$56,234,000	\$58,938,900	\$2,704,900	4.81%
Federal										

Agency Total by Program

245 Historical Society

1921 Biennial Budget

PR	\$1,245,785	\$1,356,500	\$1,400,100	\$1,382,800	8.86	8.86	\$2,713,000	\$2,782,900	\$69,900	2.58%
S	\$1,245,785	\$1,356,500	\$1,400,100	\$1,382,800	8.86	8.86	\$2,713,000	\$2,782,900	\$69,900	2.58%
Total - Federal	\$1,245,785	\$1,356,500	\$1,400,100	\$1,382,800	8.86	8.86	\$2,713,000	\$2,782,900	\$69,900	2.58%
S	\$1,245,785	\$1,356,500	\$1,400,100	\$1,382,800	8.86	8.86	\$2,713,000	\$2,782,900	\$69,900	2.58%
PGM 01 Total	\$27,357,324	\$29,558,000	\$30,952,500	\$30,938,300	185.54	185.54	\$59,116,000	\$61,890,800	\$2,774,800	4.69%
GPR	\$17,840,685	\$20,114,100	\$20,217,800	\$20,183,300	115.65	115.65	\$40,228,200	\$40,401,100	\$172,900	0.43%
A	\$84,500	\$84,500	\$84,500	\$84,500	0.00	0.00	\$169,000	\$169,000	\$0	0.00%
S	\$17,756,185	\$20,029,600	\$20,133,300	\$20,098,800	115.65	115.65	\$40,059,200	\$40,232,100	\$172,900	0.43%
PR	\$5,386,948	\$4,739,000	\$5,874,200	\$5,894,500	36.61	36.61	\$9,478,000	\$11,768,700	\$2,290,700	24.17%
S	\$5,386,948	\$4,739,000	\$5,874,200	\$5,894,500	36.61	36.61	\$9,478,000	\$11,768,700	\$2,290,700	24.17%
SEG	\$4,129,691	\$4,704,900	\$4,860,500	\$4,860,500	33.28	33.28	\$9,409,800	\$9,721,000	\$311,200	3.31%
S	\$4,129,691	\$4,704,900	\$4,860,500	\$4,860,500	33.28	33.28	\$9,409,800	\$9,721,000	\$311,200	3.31%

Agency Total by Program

245 Historical Society

1921 Biennial Budget

TOTAL 01	\$27,357,324	\$29,558,000	\$30,952,500	\$30,938,300	185.54	185.54	\$59,116,000	\$61,890,800	\$2,774,800	4.69%
A	\$84,500	\$84,500	\$84,500	\$84,500	0.00	0.00	\$169,000	\$169,000	\$0	0.00%
S	\$27,272,824	\$29,473,500	\$30,868,000	\$30,853,800	185.54	185.54	\$58,947,000	\$61,721,800	\$2,774,800	4.71%
Agency Total	\$27,357,324	\$29,558,000	\$30,952,500	\$30,938,300	185.54	185.54	\$59,116,000	\$61,890,800	\$2,774,800	4.69%

Agency Total by Decision Item

Historical Society

1921 Biennial Budget

Decision Item	1st Year Total	2nd Year Total	1st Year FTE	2nd Year FTE
2000 Adjusted Base Funding Level	\$29,558,000	\$29,558,000	135.04	135.04
3001 Turnover Reduction	(\$176,400)	(\$176,400)	0.00	0.00
3003 Full Funding of Continuing Position Salaries and Fringe Benefits	\$1,118,700	\$1,101,300	0.00	0.00
3007 Overtime	\$7,300	\$7,300	0.00	0.00
3008 Night and Weekend Differential Pay	\$12,300	\$12,300	0.00	0.00
3010 Full Funding of Lease and Directed Moves Costs	\$18,600	\$112,900	0.00	0.00
3011 Minor Transfers Within the Same Alpha Appropriation	\$0	\$0	0.00	0.00
4001 Creating an Efficient, Effective, and Equitable Workforce	\$0	\$0	46.50	46.50
4002 Safety and Security	\$93,600	\$111,400	1.00	1.00
4003 Curator of American Indian Collections	\$43,100	\$56,800	1.00	1.00
4004 National History Day Program	\$127,300	\$154,700	2.00	2.00
4005 Maritime Archaeology Program	\$150,000	\$0	0.00	0.00
TOTAL	\$30,952,500	\$30,938,300	185.54	185.54

Program Revenue

1921 Biennial Budget

	CODES	TITLES
DEPARTMENT	245	Historical Society
PROGRAM	01	History services
SUBPROGRAM		
NUMERIC APPROPRIATION	20	Records management--service funds

Revenue and Expenditures	Prior Year Actuals	Base Year Estimate	1st Year Estimate	2nd Year Estimate
Opening Balance	\$64,600	\$111,100	\$94,000	\$64,000
Program Revenue	\$274,200	\$260,700	\$261,900	\$261,900
Total Revenue	\$338,800	\$371,800	\$355,900	\$325,900
Expenditures	\$227,729	\$277,800	\$0	\$0
Additional Expenditures	\$0	\$0	\$30,000	\$30,000
2000 Adjusted Base Funding Level	\$0	\$0	\$265,100	\$265,100
3003 Full Funding of Continuing Position Salaries and Fringe Benefits	\$0	\$0	(\$3,200)	(\$3,200)
Total Expenditures	\$227,729	\$277,800	\$291,900	\$291,900
Closing Balance	\$111,071	\$94,000	\$64,000	\$34,000

Program Revenue

1921 Biennial Budget

	CODES	TITLES
DEPARTMENT	245	Historical Society
PROGRAM	01	History services
SUBPROGRAM		
NUMERIC APPROPRIATION	27	General Donations

Revenue and Expenditures	Prior Year Actuals	Base Year Estimate	1st Year Estimate	2nd Year Estimate
Opening Balance	\$3,500	\$6,600	\$3,600	\$3,600
Program Revenue	\$157,900	\$170,000	\$180,000	\$180,000
Total Revenue	\$161,400	\$176,600	\$183,600	\$183,600
Expenditures	\$154,800	\$173,000	\$0	\$0
Additional Expenditures	\$0	\$0	\$80,000	\$80,000
2000 Adjusted Base Funding Level	\$0	\$0	\$100,000	\$100,000
Total Expenditures	\$154,800	\$173,000	\$180,000	\$180,000
<u>Closing Balance</u>	\$6,600	\$3,600	\$3,600	\$3,600

Program Revenue

1921 Biennial Budget

	CODES	TITLES
DEPARTMENT	245	Historical Society
PROGRAM	01	History services
SUBPROGRAM		
NUMERIC APPROPRIATION	32	Foundation Contributed Income

Revenue and Expenditures	Prior Year Actuals	Base Year Estimate	1st Year Estimate	2nd Year Estimate
Opening Balance	\$197,700	\$390,000	\$200,900	\$55,800
Program Revenue	\$2,101,100	\$1,667,200	\$1,700,000	\$1,800,000
Total Revenue	\$2,298,800	\$2,057,200	\$1,900,900	\$1,855,800
Expenditures	\$1,908,815	\$1,856,300	\$0	\$0
Additional Expenditures	\$0	\$0	\$1,025,000	\$1,025,000
2000 Adjusted Base Funding Level	\$0	\$0	\$722,900	\$722,900
3003 Full Funding of Continuing Position Salaries and Fringe Benefits	\$0	\$0	\$97,200	\$97,200
Total Expenditures	\$1,908,815	\$1,856,300	\$1,845,100	\$1,845,100
Closing Balance	\$389,985	\$200,900	\$55,800	\$10,700

Program Revenue

1921 Biennial Budget

	CODES	TITLES
DEPARTMENT	245	Historical Society
PROGRAM	01	History services
SUBPROGRAM		
NUMERIC APPROPRIATION	34	Self-amortizing facilities; principal repayment; interest and rebates

Revenue and Expenditures	Prior Year Actuals	Base Year Estimate	1st Year Estimate	2nd Year Estimate
Opening Balance	\$0	\$0	\$0	\$0
	\$0	\$0	\$0	\$0
Total Revenue	\$0	\$0	\$0	\$0
Expenditures	\$0	\$0	\$0	\$0
Adjust AB to known Expenditures	\$0	\$0	(\$273,000)	(\$273,000)
2000 Adjusted Base Funding Level	\$0	\$0	\$273,000	\$273,000
Total Expenditures	\$0	\$0	\$0	\$0
<u>Closing Balance</u>	\$0	\$0	\$0	\$0

Program Revenue

1921 Biennial Budget

	CODES	TITLES
DEPARTMENT	245	Historical Society
PROGRAM	01	History services
SUBPROGRAM		
NUMERIC APPROPRIATION	36	Northern Great Lakes center

Revenue and Expenditures	Prior Year Actuals	Base Year Estimate	1st Year Estimate	2nd Year Estimate
Opening Balance	\$0	\$0	\$0	\$0
Program Revenue	\$217,100	\$217,100	\$246,300	\$246,300
Total Revenue	\$217,100	\$217,100	\$246,300	\$246,300
Expenditures	\$217,100	\$217,100	\$0	\$0
2000 Adjusted Base Funding Level	\$0	\$0	\$223,100	\$223,100
3003 Full Funding of Continuing Position Salaries and Fringe Benefits	\$0	\$0	\$23,200	\$23,200
Total Expenditures	\$217,100	\$217,100	\$246,300	\$246,300
<u>Closing Balance</u>	\$0	\$0	\$0	\$0

Program Revenue

1921 Biennial Budget

	CODES	TITLES
DEPARTMENT	245	Historical Society
PROGRAM	01	History services
SUBPROGRAM		
NUMERIC APPROPRIATION	37	General program operations, service funds

Revenue and Expenditures	Prior Year Actuals	Base Year Estimate	1st Year Estimate	2nd Year Estimate
Opening Balance	\$101,300	(\$131,000)	(\$124,400)	(\$70,500)
Program Revenue	\$1,308,300	\$1,630,500	\$1,650,000	\$1,680,000
Total Revenue	\$1,409,600	\$1,499,500	\$1,525,600	\$1,609,500
Expenditures	\$1,540,629	\$1,623,900	\$0	\$0
2000 Adjusted Base Funding Level	\$0	\$0	\$1,597,300	\$1,597,300
3003 Full Funding of Continuing Position Salaries and Fringe Benefits	\$0	\$0	\$43,400	\$43,400
3010 Full Funding of Lease and Directed Moves Costs	\$0	\$0	(\$44,600)	(\$43,800)
Total Expenditures	\$1,540,629	\$1,623,900	\$1,596,100	\$1,596,900
Closing Balance	(\$131,029)	(\$124,400)	(\$70,500)	\$12,600

Program Revenue

1921 Biennial Budget

	CODES	TITLES
DEPARTMENT	245	Historical Society
PROGRAM	01	History services
SUBPROGRAM		
NUMERIC APPROPRIATION	38	Storage facility

Revenue and Expenditures	Prior Year Actuals	Base Year Estimate	1st Year Estimate	2nd Year Estimate
Opening Balance	\$15,300	\$300	\$0	\$0
Program Revenue	\$201,000	\$201,000	\$1,176,700	\$1,213,500
Program Supplement	\$30,900	\$0	\$0	\$0
Total Revenue	\$247,200	\$201,300	\$1,176,700	\$1,213,500
Expenditures	\$246,890	\$201,300	\$0	\$0
2000 Adjusted Base Funding Level	\$0	\$0	\$201,100	\$201,100
3003 Full Funding of Continuing Position Salaries and Fringe Benefits	\$0	\$0	\$7,100	\$7,100
4003 Curator of American Indian Collections	\$0	\$0	\$43,100	\$56,800
3010 Full Funding of Lease and Directed Moves Costs	\$0	\$0	\$925,400	\$948,500

Total Expenditures	\$246,890	\$201,300	\$1,176,700	\$1,213,500
<u>Closing Balance</u>	\$310	\$0	\$0	\$0

Segregated Funds Revenue and Balances Statement

1921 Biennial Budget

	CODES	TITLES
DEPARTMENT	245	Historical Society
NUMERIC APPROPRIATION	61	General program operations
PROGRAM	01	History services
SUBPROGRAM		
WISMART FUND	760	

Revenue and Expenditures	Prior Year Actuals	Base Year Estimate	1st Year Estimate	2nd Year Estimate
Opening Balance	\$16,130,100	\$16,918,400	\$17,105,600	\$17,291,800
Endowment Earnings	\$1,454,500	\$800,000	\$800,000	\$800,000
Total Revenue	\$17,584,600	\$17,718,400	\$17,905,600	\$18,091,800
Expenditures	\$666,208	\$612,800	\$0	\$0
2000 Adjusted Base Funding Level	\$0	\$0	\$574,800	\$574,800
3003 Full Funding of Continuing Position Salaries and Fringe Benefits	\$0	\$0	\$39,000	\$39,000
Total Expenditures	\$666,208	\$612,800	\$613,800	\$613,800
Closing Balance	\$16,918,392	\$17,105,600	\$17,291,800	\$17,478,000

Segregated Funds Revenue and Balances Statement

1921 Biennial Budget

	CODES	TITLES
DEPARTMENT	245	Historical Society
NUMERIC APPROPRIATION	63	History preservation partnership trust fund
PROGRAM	01	History services
SUBPROGRAM		
WISMART FUND	266	

Revenue and Expenditures	Prior Year Actuals	Base Year Estimate	1st Year Estimate	2nd Year Estimate
Opening Balance	\$119,900	\$219,700	\$207,800	\$27,200
Earned Revenue	\$3,499,800	\$3,916,900	\$4,000,000	\$4,200,000
Total Revenue	\$3,619,700	\$4,136,600	\$4,207,800	\$4,227,200
Expenditures	\$3,399,977	\$3,928,800	\$0	\$0
2000 Adjusted Base Funding Level	\$0	\$0	\$4,076,600	\$4,076,600
3003 Full Funding of Continuing Position Salaries and Fringe Benefits	\$0	\$0	\$104,000	\$104,000
Total Expenditures	\$3,399,977	\$3,928,800	\$4,180,600	\$4,180,600
Closing Balance	\$219,723	\$207,800	\$27,200	\$46,600

Segregated Funds Revenue and Balances Statement

1921 Biennial Budget

	CODES	TITLES
DEPARTMENT	245	Historical Society
NUMERIC APPROPRIATION	64	Northern Great Lakes center; interpretive programming
PROGRAM	01	History services
SUBPROGRAM		
WISMART FUND	212	

Revenue and Expenditures	Prior Year Actuals	Base Year Estimate	1st Year Estimate	2nd Year Estimate
Opening Balance	\$0	\$0	\$0	\$0
Conservation Funds	\$51,900	\$51,900	\$66,100	\$66,100
Program Supplement	\$11,700	\$13,400	\$0	\$0
Total Revenue	\$63,600	\$65,300	\$66,100	\$66,100
Expenditures	\$63,500	\$65,300	\$0	\$0
2000 Adjusted Base Funding Level	\$0	\$0	\$53,500	\$53,500
3003 Full Funding of Continuing Position Salaries and Fringe Benefits	\$0	\$0	\$12,600	\$12,600
Total Expenditures	\$63,500	\$65,300	\$66,100	\$66,100

Closing Balance

\$100

\$0

\$0

\$0

Decision Item (DIN) - 2000

Decision Item (DIN) Title - Adjusted Base Funding Level

NARRATIVE

Adjusted Base Funding Level.

Decision Item by Line

1921 Biennial Budget

	CODES	TITLES
DEPARTMENT	245	Historical Society
	CODES	TITLES
DECISION ITEM	2000	Adjusted Base Funding Level

Expenditure items		1st Year Cost	2nd Year Cost
01	Permanent Position Salaries	\$7,791,900	\$7,791,900
02	Turnover	\$0	\$0
03	Project Position Salaries	\$11,300	\$11,300
04	LTE/Misc. Salaries	\$2,573,300	\$2,573,300
05	Fringe Benefits	\$4,063,500	\$4,063,500
06	Supplies and Services	\$10,352,400	\$10,352,400
07	Permanent Property	\$0	\$0
08	Unalloted Reserve	\$0	\$0
09	Aids to Individuals Organizations	\$84,500	\$84,500
10	Local Assistance	\$0	\$0
11	One-time Financing	\$0	\$0
12	Debt Service	\$4,681,100	\$4,681,100
13	Special Purpose	\$0	\$0
14		\$0	\$0
15		\$0	\$0
16		\$0	\$0
17	Total Cost	\$29,558,000	\$29,558,000

18	Project Positions Authorized	0.00	0.00
19	Classified Positions Authorized	128.04	128.04
20	Unclassified Positions Authorized	7.00	7.00

Decision Item by Numeric

Historical Society

Program	Decision Item/Numeric	1st Year Total	2nd Year Total	1st Year FTE	2nd Year FTE
	2000	Adjusted Base Funding Level			
01	History services				
	01 General program operations	\$14,880,900	\$14,880,900	97.15	97.15
	03 Wisconsin black historical society and museum	\$84,500	\$84,500	0.00	0.00
	05 Energy costs; energy-related assessments	\$740,600	\$740,600	0.00	0.00
	06 Principal repayment, interest, and rebates	\$4,408,100	\$4,408,100	0.00	0.00
	20 Records management--service funds	\$265,100	\$265,100	2.00	2.00
	27 General Donations	\$100,000	\$100,000	0.00	0.00
	32 Foundation Contributed Income	\$722,900	\$722,900	5.00	5.00
	34 Self-amortizing facilities; principal repayment; interest and rebates	\$273,000	\$273,000	0.00	0.00
	36 Northern Great Lakes center	\$223,100	\$223,100	2.75	2.75
	37 General program operations, service funds	\$1,597,300	\$1,597,300	8.50	8.50
	38 Storage facility	\$201,100	\$201,100	0.00	0.00
	41 General program operations, federal funds	\$1,255,300	\$1,255,300	6.86	6.86
	45 Indirect cost reimbursements	\$101,200	\$101,200	0.00	0.00
	61 General program operations	\$574,800	\$574,800	2.25	2.25
	63 History preservation partnership trust fund	\$4,076,600	\$4,076,600	9.53	9.53
	64 Northern Great Lakes center;	\$53,500	\$53,500	1.00	1.00

Decision Item by Numeric

Historical Society

	interpretive programming				
	History services SubTotal	\$29,558,000	\$29,558,000	135.04	135.04
	Adjusted Base Funding Level SubTotal	\$29,558,000	\$29,558,000	135.04	135.04
	Agency Total	\$29,558,000	\$29,558,000	135.04	135.04

Decision Item by Fund Source

Historical Society

	Source of Funds		1st Year Total	2nd Year Total	1st Year FTE	2nd Year FTE
Decision Item	2000	Adjusted Base Funding Level				
	GPR	A	\$84,500	\$84,500	0.00	0.00
	GPR	S	\$20,029,600	\$20,029,600	97.15	97.15
	PR	S	\$3,382,500	\$3,382,500	18.25	18.25
	PR Federal	S	\$1,356,500	\$1,356,500	6.86	6.86
	SEG	S	\$4,704,900	\$4,704,900	12.78	12.78
	Total		\$29,558,000	\$29,558,000	135.04	135.04
Agency Total			\$29,558,000	\$29,558,000	135.04	135.04

Decision Item (DIN) - 3001

Decision Item (DIN) Title - Turnover Reduction

NARRATIVE

Standard Budget Adjustment - Turnover Reduction

Decision Item by Line

1921 Biennial Budget

	CODES	TITLES
DEPARTMENT	245	Historical Society
	CODES	TITLES
DECISION ITEM	3001	Turnover Reduction

Expenditure items		1st Year Cost	2nd Year Cost
01	Permanent Position Salaries	\$0	\$0
02	Turnover	(\$176,400)	(\$176,400)
03	Project Position Salaries	\$0	\$0
04	LTE/Misc. Salaries	\$0	\$0
05	Fringe Benefits	\$0	\$0
06	Supplies and Services	\$0	\$0
07	Permanent Property	\$0	\$0
08	Unalloted Reserve	\$0	\$0
09	Aids to Individuals Organizations	\$0	\$0
10	Local Assistance	\$0	\$0
11	One-time Financing	\$0	\$0
12	Debt Service	\$0	\$0
13	Special Purpose	\$0	\$0
14		\$0	\$0
15		\$0	\$0
16		\$0	\$0
17	Total Cost	(\$176,400)	(\$176,400)

18	Project Positions Authorized	0.00	0.00
19	Classified Positions Authorized	0.00	0.00
20	Unclassified Positions Authorized	0.00	0.00

Decision Item by Numeric

Historical Society

Program	Decision Item/Numeric	1st Year Total	2nd Year Total	1st Year FTE	2nd Year FTE
	3001	Turnover Reduction			
01	History services				
	01 General program operations	(\$176,400)	(\$176,400)	0.00	0.00
	History services SubTotal	(\$176,400)	(\$176,400)	0.00	0.00
	Turnover Reduction SubTotal	(\$176,400)	(\$176,400)	0.00	0.00
	Agency Total	(\$176,400)	(\$176,400)	0.00	0.00

Decision Item by Fund Source

Historical Society

	Source of Funds		1st Year Total	2nd Year Total	1st Year FTE	2nd Year FTE
Decision Item	3001	Turnover Reduction				
	GPR	S	(\$176,400)	(\$176,400)	0.00	0.00
	Total		(\$176,400)	(\$176,400)	0.00	0.00
Agency Total			(\$176,400)	(\$176,400)	0.00	0.00

Decision Item (DIN) - 3003

Decision Item (DIN) Title - Full Funding of Continuing Position Salaries and Fringe Benefits

NARRATIVE

Standard Budget Adjustment - Full Funding of Continuing Position Salaries and Fringe Benefits

Decision Item by Line

1921 Biennial Budget

	CODES	TITLES
DEPARTMENT	245	Historical Society
	CODES	TITLES
DECISION ITEM	3003	Full Funding of Continuing Position Salaries and Fringe Benefits

Expenditure items		1st Year Cost	2nd Year Cost
01	Permanent Position Salaries	\$615,600	\$603,700
02	Turnover	\$0	\$0
03	Project Position Salaries	\$0	\$0
04	LTE/Misc. Salaries	\$0	\$0
05	Fringe Benefits	\$503,100	\$497,600
06	Supplies and Services	\$0	\$0
07	Permanent Property	\$0	\$0
08	Unalloted Reserve	\$0	\$0
09	Aids to Individuals Organizations	\$0	\$0
10	Local Assistance	\$0	\$0
11	One-time Financing	\$0	\$0
12	Debt Service	\$0	\$0
13	Special Purpose	\$0	\$0
14		\$0	\$0
15		\$0	\$0
16		\$0	\$0
17	Total Cost	\$1,118,700	\$1,101,300

18	Project Positions Authorized	0.00	0.00
19	Classified Positions Authorized	0.00	0.00
20	Unclassified Positions Authorized	0.00	0.00

Decision Item by Numeric

Historical Society

Program	Decision Item/Numeric	1st Year Total	2nd Year Total	1st Year FTE	2nd Year FTE
	3003	Full Funding of Continuing Position Salaries and Fringe Benefits			
01	History services				
	01 General program operations	\$748,600	\$748,600	0.00	0.00
	20 Records management--service funds	(\$3,200)	(\$3,200)	0.00	0.00
	32 Foundation Contributed Income	\$97,200	\$97,200	0.00	0.00
	36 Northern Great Lakes center	\$23,200	\$23,200	0.00	0.00
	37 General program operations, service funds	\$43,400	\$43,400	0.00	0.00
	38 Storage facility	\$7,100	\$7,100	0.00	0.00
	41 General program operations, federal funds	\$46,800	\$29,400	0.00	0.00
	61 General program operations	\$39,000	\$39,000	0.00	0.00
	63 History preservation partnership trust fund	\$104,000	\$104,000	0.00	0.00
	64 Northern Great Lakes center; interpretive programming	\$12,600	\$12,600	0.00	0.00
	History services SubTotal	\$1,118,700	\$1,101,300	0.00	0.00
	Full Funding of Continuing Position Salaries and Fringe Benefits SubTotal	\$1,118,700	\$1,101,300	0.00	0.00
	Agency Total	\$1,118,700	\$1,101,300	0.00	0.00

Decision Item by Fund Source

Historical Society

	Source of Funds		1st Year Total	2nd Year Total	1st Year FTE	2nd Year FTE
Decision Item	3003	Full Funding of Continuing Position Salaries and Fringe Benefits				
	GPR	S	\$748,600	\$748,600	0.00	0.00
	PR	S	\$167,700	\$167,700	0.00	0.00
	PR Federal	S	\$46,800	\$29,400	0.00	0.00
	SEG	S	\$155,600	\$155,600	0.00	0.00
	Total		\$1,118,700	\$1,101,300	0.00	0.00
Agency Total			\$1,118,700	\$1,101,300	0.00	0.00

Decision Item (DIN) - 3007

Decision Item (DIN) Title - Overtime

NARRATIVE

Standard Budget Adjustment - Overtime

Decision Item by Line

1921 Biennial Budget

	CODES	TITLES
DEPARTMENT	245	Historical Society
	CODES	TITLES
DECISION ITEM	3007	Overtime

Expenditure items		1st Year Cost	2nd Year Cost
01	Permanent Position Salaries	\$6,300	\$6,300
02	Turnover	\$0	\$0
03	Project Position Salaries	\$0	\$0
04	LTE/Misc. Salaries	\$0	\$0
05	Fringe Benefits	\$1,000	\$1,000
06	Supplies and Services	\$0	\$0
07	Permanent Property	\$0	\$0
08	Unalloted Reserve	\$0	\$0
09	Aids to Individuals Organizations	\$0	\$0
10	Local Assistance	\$0	\$0
11	One-time Financing	\$0	\$0
12	Debt Service	\$0	\$0
13	Special Purpose	\$0	\$0
14		\$0	\$0
15		\$0	\$0
16		\$0	\$0
17	Total Cost	\$7,300	\$7,300

18	Project Positions Authorized	0.00	0.00
19	Classified Positions Authorized	0.00	0.00
20	Unclassified Positions Authorized	0.00	0.00

Decision Item by Numeric

Historical Society

Program	Decision Item/Numeric	1st Year Total	2nd Year Total	1st Year FTE	2nd Year FTE
	3007	Overtime			
01	History services				
	01 General program operations	\$7,300	\$7,300	0.00	0.00
	History services SubTotal	\$7,300	\$7,300	0.00	0.00
	Overtime SubTotal	\$7,300	\$7,300	0.00	0.00
	Agency Total	\$7,300	\$7,300	0.00	0.00

Decision Item by Fund Source

Historical Society

	Source of Funds			1st Year Total	2nd Year Total	1st Year FTE	2nd Year FTE
Decision Item	3007	Overtime					
	GPR	S		\$7,300	\$7,300	0.00	0.00
	Total			\$7,300	\$7,300	0.00	0.00
Agency Total				\$7,300	\$7,300	0.00	0.00

Decision Item (DIN) - 3008

Decision Item (DIN) Title - Night and Weekend Differential Pay

NARRATIVE

Standard Budget Adjustment - Night and Weekend Differential Pay

Decision Item by Line

1921 Biennial Budget

	CODES	TITLES
DEPARTMENT	245	Historical Society
	CODES	TITLES
DECISION ITEM	3008	Night and Weekend Differential Pay

Expenditure items		1st Year Cost	2nd Year Cost
01	Permanent Position Salaries	\$10,700	\$10,700
02	Turnover	\$0	\$0
03	Project Position Salaries	\$0	\$0
04	LTE/Misc. Salaries	\$0	\$0
05	Fringe Benefits	\$1,600	\$1,600
06	Supplies and Services	\$0	\$0
07	Permanent Property	\$0	\$0
08	Unalloted Reserve	\$0	\$0
09	Aids to Individuals Organizations	\$0	\$0
10	Local Assistance	\$0	\$0
11	One-time Financing	\$0	\$0
12	Debt Service	\$0	\$0
13	Special Purpose	\$0	\$0
14		\$0	\$0
15		\$0	\$0
16		\$0	\$0
17	Total Cost	\$12,300	\$12,300

18	Project Positions Authorized	0.00	0.00
19	Classified Positions Authorized	0.00	0.00
20	Unclassified Positions Authorized	0.00	0.00

Decision Item by Numeric

Historical Society

Program	Decision Item/Numeric	1st Year Total	2nd Year Total	1st Year FTE	2nd Year FTE
	3008	Night and Weekend Differential Pay			
01	History services				
	01 General program operations	\$12,300	\$12,300	0.00	0.00
	History services SubTotal	\$12,300	\$12,300	0.00	0.00
	Night and Weekend Differential Pay SubTotal	\$12,300	\$12,300	0.00	0.00
	Agency Total	\$12,300	\$12,300	0.00	0.00

Decision Item by Fund Source

Historical Society

	Source of Funds		1st Year Total	2nd Year Total	1st Year FTE	2nd Year FTE
Decision Item	3008	Night and Weekend Differential Pay				
	GPR	S	\$12,300	\$12,300	0.00	0.00
	Total		\$12,300	\$12,300	0.00	0.00
Agency Total			\$12,300	\$12,300	0.00	0.00

Decision Item (DIN) - 3010

Decision Item (DIN) Title - Full Funding of Lease and Directed Moves Costs

NARRATIVE

Standard Budget Adjustment - Full Funding of Lease and Directed Moves Costs

Decision Item by Line

1921 Biennial Budget

	CODES	TITLES
DEPARTMENT	245	Historical Society
	CODES	TITLES
DECISION ITEM	3010	Full Funding of Lease and Directed Moves Costs

Expenditure items		1st Year Cost	2nd Year Cost
01	Permanent Position Salaries	\$0	\$0
02	Turnover	\$0	\$0
03	Project Position Salaries	\$0	\$0
04	LTE/Misc. Salaries	\$0	\$0
05	Fringe Benefits	\$0	\$0
06	Supplies and Services	\$18,600	\$112,900
07	Permanent Property	\$0	\$0
08	Unalloted Reserve	\$0	\$0
09	Aids to Individuals Organizations	\$0	\$0
10	Local Assistance	\$0	\$0
11	One-time Financing	\$0	\$0
12	Debt Service	\$0	\$0
13	Special Purpose	\$0	\$0
14		\$0	\$0
15		\$0	\$0
16		\$0	\$0
17	Total Cost	\$18,600	\$112,900

18	Project Positions Authorized	0.00	0.00
19	Classified Positions Authorized	0.00	0.00
20	Unclassified Positions Authorized	0.00	0.00

Decision Item by Numeric

Historical Society

Program	Decision Item/Numeric	1st Year Total	2nd Year Total	1st Year FTE	2nd Year FTE
	3010	Full Funding of Lease and Directed Moves Costs			
01	History services				
	01 General program operations	(\$859,000)	(\$788,700)	0.00	0.00
	37 General program operations, service funds	(\$44,600)	(\$43,800)	0.00	0.00
	38 Storage facility	\$925,400	\$948,500	0.00	0.00
	41 General program operations, federal funds	(\$3,200)	(\$3,100)	0.00	0.00
	History services SubTotal	\$18,600	\$112,900	0.00	0.00
	Full Funding of Lease and Directed Moves Costs SubTotal	\$18,600	\$112,900	0.00	0.00
	Agency Total	\$18,600	\$112,900	0.00	0.00

Decision Item by Fund Source

Historical Society

	Source of Funds		1st Year Total	2nd Year Total	1st Year FTE	2nd Year FTE
Decision Item	3010	Full Funding of Lease and Directed Moves Costs				
	GPR	S	(\$859,000)	(\$788,700)	0.00	0.00
	PR	S	\$880,800	\$904,700	0.00	0.00
	PR Federal	S	(\$3,200)	(\$3,100)	0.00	0.00
	Total		\$18,600	\$112,900	0.00	0.00
Agency Total			\$18,600	\$112,900	0.00	0.00

Decision Item (DIN) - 3011

Decision Item (DIN) Title - Minor Transfers Within the Same Alpha Appropriation

NARRATIVE

Standard Budget Adjustment - Minor Transfers Within the Same Alpha Appropriation

Decision Item by Line

1921 Biennial Budget

	CODES	TITLES
DEPARTMENT	245	Historical Society
	CODES	TITLES
DECISION ITEM	3011	Minor Transfers Within the Same Alpha Appropriation

Expenditure items		1st Year Cost	2nd Year Cost
01	Permanent Position Salaries	\$0	\$0
02	Turnover	\$0	\$0
03	Project Position Salaries	\$0	\$0
04	LTE/Misc. Salaries	\$13,600	\$38,600
05	Fringe Benefits	\$0	\$0
06	Supplies and Services	(\$13,600)	(\$38,600)
07	Permanent Property	\$0	\$0
08	Unalloted Reserve	\$0	\$0
09	Aids to Individuals Organizations	\$0	\$0
10	Local Assistance	\$0	\$0
11	One-time Financing	\$0	\$0
12	Debt Service	\$0	\$0
13	Special Purpose	\$0	\$0
14		\$0	\$0
15		\$0	\$0
16		\$0	\$0
17	Total Cost	\$0	\$0

18	Project Positions Authorized	0.00	0.00
19	Classified Positions Authorized	0.00	0.00
20	Unclassified Positions Authorized	0.00	0.00

Decision Item by Numeric

Historical Society

Program	Decision Item/Numeric	1st Year Total	2nd Year Total	1st Year FTE	2nd Year FTE
	3011	Minor Transfers Within the Same Alpha Appropriation			
01	History services				
	38 Storage facility	\$0	\$0	0.00	0.00
	History services SubTotal	\$0	\$0	0.00	0.00
	Minor Transfers Within the Same Alpha Appropriation SubTotal	\$0	\$0	0.00	0.00
	Agency Total	\$0	\$0	0.00	0.00

Decision Item by Fund Source

Historical Society

	Source of Funds		1st Year Total	2nd Year Total	1st Year FTE	2nd Year FTE
Decision Item	3011	Minor Transfers Within the Same Alpha Appropriation				
	PR	S	\$0	\$0	0.00	0.00
	Total		\$0	\$0	0.00	0.00
Agency Total			\$0	\$0	0.00	0.00

Decision Item (DIN) - 4001

Decision Item (DIN) Title - Creating an Efficient, Effective, and Equitable Workforce

NARRATIVE

Please see attachment for details.



WISCONSIN
HISTORICAL
SOCIETY

2019-21 Biennial Budget Request

Creating an Efficient, Effective, and Equitable Workforce

Executive Summary

The Wisconsin Historical Society (Society) requests 19.50 FTE SEG 163, 15.50 FTE GPR 101, 3.00 FTE PRS 137, 3.00 FTE PRS 138, 2.50 FTE PR 132, 2.0 FTE PRF 141, and 1.00 FTE 161 to align its permanent position authority with current Society resources. The Society is not requesting additional funding, only position authority, as existing funds spent on Limited Term Employee (LTE) positions would be redirected to support full time equivalent jobs.

This request will allow the Society and the Department of Personnel Management (DPM) to reduce unnecessary costs, better steward state taxpayer resources, and position the Society's workforce to more sustainably support existing core functions and address its future programming and facility support needs.

For the Society to realize its goals, increase service throughout Wisconsin, and remain a national leader into the 21st century, the agency's position authority must align with its core, year-round, staffing requirements.

In addition, with the implementation of the state's Human Resources Shared Services (HRSS) initiative it is imperative that the Society address its staffing model to align its employment environment with the rest of state government, allowing to the Society to work effectively under state HR policies, standards, and operational procedures.

Background

Since 1846, the Society has been a national leader and premiere state history organization with collections second only to the Library of Congress, 12 historic sites and museums, the nation's most innovative historic preservation office, educational services extending through every WI county, and a collection that is accessed by over four million people each year through a library and archives in Madison, a network of area research centers across the state, and online.

However, since 1995, the Society has absorbed a total net reduction of 42.00 FTE while at the same time adding the following sites, expansions, and programs to its operational footprint:

- HH Bennett Studio Historic Site
- Reed School Historic Site
- Black Point Estate Historic Site
- A new museum and visitor center at Wade House Historic Site
- Circus World Museum
- The State Archive Preservation Facility

To maintain operations and fulfill its statutory mandates, the Society has increased its reliance on LTEs for core, year-round functions across each of the Society's program areas. This approach is unsustainable and threatens the Society's standing as the nation's premiere historical state agency. Like the State of Wisconsin, the Society must attract, retain, and develop the most effective and efficient workforce. In addition, the Society and DPM must reconcile the staffing model for the Society with the implementation of HRSS.

Justification/Need

The Society's current staffing model¹ relies on employees in 110 LTE appointments to perform core, year-round work. This extreme reliance upon temporary positions to perform permanent work has resulted in an inefficient and ineffective employment and operational environment at the Society with the following consequences:

1. The state's HRSS program, which is largely designed to serve agencies with permanent FTE staffing models, will struggle to serve the Society's workforce because the program metrics, staffing, and service models are all based on the specific agencies' FTE counts.
2. The Society must absorb a significant added annual cost of \$271,400 related to employee turnover, training and onboarding, support and administrative costs, and the cost of supervision and communication associated with the 110 LTE appointments.²
3. The Society must manage the significant negative employee morale among LTE employees. Employees in LTE appointments that perform core work similar to FTEs feel under-valued by the state. Employees in LTE positions are not eligible for the same benefits as FTEs are generally compensated at a lower rate than permanent staff. Maintaining two employment categories for employees that perform permanent year-round functions creates inequities among staff and creates morale and organizational cultural issues.
4. Finally, by perpetuating this staffing model, the Society and state face increased risk management and legal concerns. With scarce position authority, the Society has fewer supervisors as defined by state statute. Training on employment, safety, and security matters becomes more difficult. Scheduling challenges with the LTE appointments and turnover may mean that a site is staffed inadequately at a given time, which poses a safety and/or security risk.

Proposed Solution

The Society is seeking position authority so that its regular, essential, and year-round work functions can be performed by permanent staff rather than part-time and limited-term employees. If approved, this modification to the Society's staffing model would allow the Society to convert approximately 110 LTE appointments into 46.50 FTE positions utilizing the same financial resources.

Proposed Benefits

By shifting LTE appointments performing core, year-round functions to permanent jobs and improving the Society's staffing model to better align with the processes and procedures of HRSS, the Society and DPM would realize significant financial and organizational benefits in the long-term.

Specific benefits include:

- Increased service to the public, improved mission effectiveness, and position authority that matches the Society's core, year-round staffing requirements
- Increased employee morale, higher employee satisfaction and productivity, and higher retention of talent in the long term at the Society
- A cost reduction of \$271,400 in annual turnover cost realized by the Society and DPM in the long-term
- Improved compliance with state HRSS programs, policies, and procedures
- Improved HRSS transition for the Society and DPM

It is important to note, that the impact of these changes would be felt over time as permanent recruitments are completed and the Society's staffing model shifts. As increased staff capacity, talent, and effectiveness is realized, the Society would be in a position to invest the incremental returns in the many under supported statutorily required elements of its current operations as well as new growth opportunities in the future.

¹ Staffing model detailed in Appendix 1

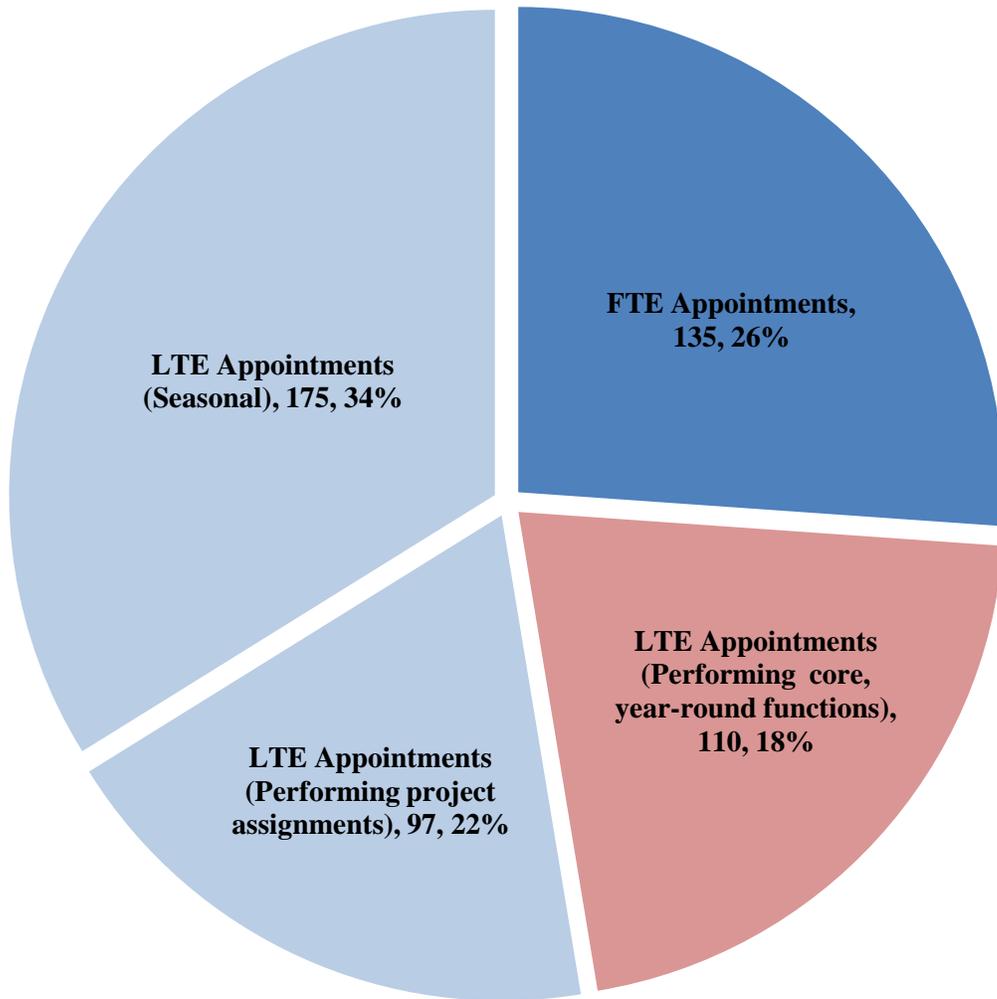
² Added costs detailed in Appendix 2

Conclusion

With the State of Wisconsin's goal to create, support, and maintain the most effective and efficient workforce through the implementation of HRSS, and the Society's goal to remain one of the nation's premiere state history organizations, it makes both financial and business sense to increase the Society's permanent position authority. Providing the Society the ability to redeploy existing funds into permanent positions would save tax payer dollars and position the Society for the future to increase and expand its educational services, increase the quality of Society's workforce, and improve the Society's employment environment.

Appendix 1: Wisconsin Historical Society July 2018 Staffing Snap Shot

Total FTE and LTE Appointments = 517



Snapshot does not include:

- 36 work study students
- 150 volunteers

Appendix 2: Added Costs Due to Reliance on Limited Term Employees

Cost of employee turnover

At the Society, employee turnover costs include:

- **Training and onboarding costs.** Because employees in LTE positions cannot work more than 1039 hours per year, they are continually leaving positions within the Society to take permanent jobs in other organizations. As a result, the Society must continually recruit, onboard, and train LTE employees. Because it requires two LTE appointments (1039 hours per year) to do the job of one FTE, the training and onboarding costs for a function utilizing LTE labor are constant.
- **Other support function administrative costs.** The continued flux and churn of LTE appointments places considerable burden on the Society’s administrative teams, including Information Technology, Finance, Facilities/Safety, and particularly Human Resources. From managing login issues to monitoring hours worked to ensure statutory compliance, to continued recruitment, selection, background checking, hiring, computer set-up, safety support systems, and permanent employees are stretched and not allowed to focus on position responsibilities that most effectively utilize their talents.
- **Communication costs.** It is nearly impossible to discuss certain topics at all staff, division, and team meetings because the subject matter is not relevant to a significant percentage of the (LTE) workforce. To avoid additional disgruntlement, Society supervisors and managers must maintain separate communication to employees of different status which is both inefficient and contributes to poor morale.

According to a 2017 study by Work Institute, a leader in employee engagement, retention, and human resources consulting, it costs employers 33% of a worker’s annual salary to hire a replacement if that worker leaves.

Using a more conservative turnover cost estimate of 20%, the following table compares the annual cost of turnover for the 110 LTE appointments that would be replaced by the 46.50 FTE in this request.

	Appointments	Hours / Appointment	Turnover Rate	Average Annual Salary Per Appointment	Cost of Turnover @ 20% annualized salary
FTE Structure	46.5	2080	14%	\$ 45,000	\$ 58,590
LTE Structure	110	1039	100%	\$ 15,000	\$ 330,000
Additional Cost of Turnover in LTE structure					\$ 271,410

Decision Item by Line

1921 Biennial Budget

	CODES	TITLES
DEPARTMENT	245	Historical Society
	CODES	TITLES
DECISION ITEM	4001	Creating an Efficient, Effective, and Equitable Workforce

Expenditure items		1st Year Cost	2nd Year Cost
01	Permanent Position Salaries	\$1,350,100	\$1,800,300
02	Turnover	\$0	\$0
03	Project Position Salaries	\$0	\$0
04	LTE/Misc. Salaries	(\$1,350,100)	(\$1,800,300)
05	Fringe Benefits	\$0	\$0
06	Supplies and Services	\$0	\$0
07	Permanent Property	\$0	\$0
08	Unalloted Reserve	\$0	\$0
09	Aids to Individuals Organizations	\$0	\$0
10	Local Assistance	\$0	\$0
11	One-time Financing	\$0	\$0
12	Debt Service	\$0	\$0
13	Special Purpose	\$0	\$0
14		\$0	\$0
15		\$0	\$0
16		\$0	\$0
17	Total Cost	\$0	\$0

18	Project Positions Authorized	0.00	0.00
19	Classified Positions Authorized	46.50	46.50
20	Unclassified Positions Authorized	0.00	0.00

Decision Item by Numeric

Historical Society

Program	Decision Item/Numeric	1st Year Total	2nd Year Total	1st Year FTE	2nd Year FTE
	4001	Creating an Efficient, Effective, and Equitable Workforce			
01	History services				
	01 General program operations	\$0	\$0	15.50	15.50
	32 Foundation Contributed Income	\$0	\$0	2.50	2.50
	37 General program operations, service funds	\$0	\$0	3.00	3.00
	38 Storage facility	\$0	\$0	3.00	3.00
	41 General program operations, federal funds	\$0	\$0	2.00	2.00
	61 General program operations	\$0	\$0	1.00	1.00
	63 History preservation partnership trust fund	\$0	\$0	19.50	19.50
	History services SubTotal	\$0	\$0	46.50	46.50
	Creating an Efficient, Effective, and Equitable Workforce SubTotal	\$0	\$0	46.50	46.50
	Agency Total	\$0	\$0	46.50	46.50

Decision Item by Fund Source

Historical Society

	Source of Funds		1st Year Total	2nd Year Total	1st Year FTE	2nd Year FTE
Decision Item	4001	Creating an Efficient, Effective, and Equitable Workforce				
	GPR	S	\$0	\$0	15.50	15.50
	PR	S	\$0	\$0	8.50	8.50
	PR Federal	S	\$0	\$0	2.00	2.00
	SEG	S	\$0	\$0	20.50	20.50
	Total		\$0	\$0	46.50	46.50
Agency Total			\$0	\$0	46.50	46.50

Decision Item (DIN) - 4002

Decision Item (DIN) Title - Safety and Security

NARRATIVE

Please see attachment for details.



WISCONSIN
HISTORICAL
SOCIETY

2019-21 Biennial Budget Request

Safety and Security

Executive Summary

The Wisconsin Historical Society (Society) requests \$93,600¹ GPR 101 and 1.00 FTE in FY 2020 and \$111,400² in FY 2021 to support an improved and essential safety and security program spanning all Society-operated facilities across the state. This request seeks 1.0 FTE for a Safety and Security Manger and funding to support this position on a permanent basis as well as Supplies and Services funding to support necessary safety training and personal protective equipment for employees, AED and first aid kits for visitors, employees, and volunteers at 13 locations, and travel and supply expenses for the Security and Safety Manager.

Background

The Society maintains facilities at 13 geographic locations across Wisconsin. All of them serve the public, including thousands of K-12 school children and families. Only the Society’s Headquarters Building in Madison has a contracted security guard. Several recent safety and security related incidents have prompted the Society to evaluate its safety and security protocols.

Justification / Need

While improvements have been implemented, the Society lacks the resources to sustain a robust and consistent safety and security program. Ensuring the safety of our public visitors, school children and teachers, employees, and volunteers must be a high priority. Failing to address this need could result in serious safety and security issues for the State and the Society.

Proposed Solution

Safety and security at all Society properties can be significantly enhanced by hiring a full-time Safety and Security Manager. This manager would exercise a high level of leadership in planning, developing, implementing, administering, and evaluating the Society’s statewide workplace risk and safety program and Continuity of Operations Program (COOP). This includes formulating and implementing the Society’s policies and procedures pertaining to health and safety to assure compliance with both state and federal laws and regulations.

This position would provide direction and assistance to Society employees, supervisors, and volunteers statewide to maintain safe workplaces and attractions that are safe for all members of the public. The Safety and Security Manager would partner with other state and federal agencies that support safety, such as the Department of Administration’s Continuity of Operations Program, the Department of Safety and Professional Services Division of Industry Services, the Department of Workforce Development Worker’s Compensation Division, the Federal Emergency Management Agency, the Occupational Safety and Health Administration, and the US Department of Homeland Security.

To improve site security functions, the Safety and Security Manager would:

¹ 1.00 FTE Risk Management Specialist – Senior (\$23.38 per hour, 9 months)	\$36,500
Fringe Benefits (at a rate of 46.92%)	17,100
Travel, training, supplies, & equipment to support Safety & Security Program	40,000
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FY 2020 Total	\$93,600
² 1.00 FTE Risk Management Specialist – Senior (\$23.38 per hour, 12 months)	\$48,600
Fringe Benefits (at a rate of 46.92%)	22,800
Travel, training, supplies, & equipment to support Safety & Security Program	40,000
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FY 2021 Total	\$111,400

- Develop and implement security policies, protocols and procedures.
- Conduct routine inspection of buildings to check for unsafe or insecure situations and, when found, have conditions corrected or recommend changes.
- Plan and coordinate security operations for specific events.
- Coordinate staff when responding to emergencies and alarms.
- Review reports on incidents and breaches, investigate and resolve security issues, and create reports for management on security status.

To develop a comprehensive statewide workplace risk management and safety program, the Manager would:

- Complete statewide worksite assessments for General Industry and Construction Industry health and safety standards.
- Complete routine internal site safety and health assessment to identify hazards and provide a reliable system for employees to identify and remediate hazardous conditions.
- Develop a program for incident and accident investigation and follow-up.
- Create a statewide safety and health training program for new hires, contract workers, employees who wear personal protective equipment, and workers in high risk areas.
- Maintain emergency action plans and procedures for each Society location; reviewing and updating the plans and procedures as needed.

The Society will also request Capital Project funding to (1) commission a third party security and safety assessment and (2) implement the security and safety recommendations arising from the study.

Proposed Benefits

This proposal will allow the Society to assess existing risks and identify best practices in order to mitigate or eliminate possible safety and security threats at its facilities. It will also allow the Society to coordinate its responses more effectively to potential problems with other state agencies, local law enforcement agencies, and the State Capitol Police. Ensuring that safety and security practices are coordinated across the Society's operations will help to increase safety for visitors, staff members, and volunteers.

Decision Item by Line

1921 Biennial Budget

	CODES	TITLES
DEPARTMENT	245	Historical Society
	CODES	TITLES
DECISION ITEM	4002	Safety and Security

Expenditure items		1st Year Cost	2nd Year Cost
01	Permanent Position Salaries	\$36,500	\$48,600
02	Turnover	\$0	\$0
03	Project Position Salaries	\$0	\$0
04	LTE/Misc. Salaries	\$0	\$0
05	Fringe Benefits	\$17,100	\$22,800
06	Supplies and Services	\$40,000	\$40,000
07	Permanent Property	\$0	\$0
08	Unalloted Reserve	\$0	\$0
09	Aids to Individuals Organizations	\$0	\$0
10	Local Assistance	\$0	\$0
11	One-time Financing	\$0	\$0
12	Debt Service	\$0	\$0
13	Special Purpose	\$0	\$0
14		\$0	\$0
15		\$0	\$0
16		\$0	\$0
17	Total Cost	\$93,600	\$111,400

18	Project Positions Authorized	0.00	0.00
19	Classified Positions Authorized	1.00	1.00
20	Unclassified Positions Authorized	0.00	0.00

Decision Item by Numeric

Historical Society

Program	Decision Item/Numeric	1st Year Total	2nd Year Total	1st Year FTE	2nd Year FTE
	4002	Safety and Security			
01	History services				
	01 General program operations	\$93,600	\$111,400	1.00	1.00
	History services SubTotal	\$93,600	\$111,400	1.00	1.00
	Safety and Security SubTotal	\$93,600	\$111,400	1.00	1.00
	Agency Total	\$93,600	\$111,400	1.00	1.00

Decision Item by Fund Source

Historical Society

	Source of Funds			1st Year Total	2nd Year Total	1st Year FTE	2nd Year FTE
Decision Item	4002	Safety and Security					
	GPR	S	\$93,600	\$111,400	1.00	1.00	
	Total		\$93,600	\$111,400	1.00	1.00	
Agency Total			\$93,600	\$111,400	1.00	1.00	

Decision Item (DIN) - 4003

Decision Item (DIN) Title - Curator of American Indian Collections

NARRATIVE

Please see attachment for details.



2019-21 Biennial Budget Request

Curator of American Indian Collections

Executive Summary

The Wisconsin Historical Society (Society) requests \$43,100¹ PRS 138 and 1.00 FTE in FY 2020 and \$56,800² in FY 2021 for a Curator of American Indian Collections headquartered at the State Archives Preservation Facility (SAPF). The Curator position is critical for assisting Native nations in gaining information about, and access to, the collections at the Society. This position would collect, preserve, steward, research, and interpret American Indian collections and would further the Society and State’s goal of improving education and expanding access to all Wisconsin students and schools.

Background

The Society understands the importance of American Indian culture in the formation of the state’s history as well as the significant role American Indian nations continue to play in Wisconsin and the United States today. The Society’s American Indian collections document the rich history of the 12 distinct nations of Wisconsin, including 11 federally recognized tribes. Nevertheless, the lack of an interpretative curator dedicated to American Indian history has diminished the Society’s ability to serve the needs of Native nations effectively. Additionally, until the opening of SAPF, the Society did not have the proper facility in which to care for and preserve these collections and stopped actively collecting these important objects. SAPF is one of two facilities in the United States that is equipped to properly preserve and provide access for the care of sacred objects.

Justification/Need

A Curator of American Indian Collections is critical in representing American Indian history and ethnic diversity, and in developing key content and planning for acquisitions to the collection. The position would allow the Society and the State to fulfill its government-to-government responsibility to the Native nations, including stewarding the collections, supporting Native voices, and contributing to the maintenance and preservation of Native history and culture. As plans for a new state history museum move forward, the Society needs a knowledgeable specialist to develop American Indian storylines, interpretations, and educational resources effectively in collaboration with Native nations.

SAPF provides special storage and an adjacent ceremonial area for the care of American Indian sacred objects, making it one of only a few in the nation providing these services. This facility increases the need for a specialist to work with tribal elders and spiritual leaders when they utilize important objects in the American Indian ceremonial space. The Curator and the SAPF amenities will also help to bring together the 12 American Indian nations of Wisconsin in a unique way that has not occurred in the past.

Proposed Solution

Supporting a Curator of American Indian Collections will provide a much needed professional to work actively with Native nations and representatives in the development of a collecting policy to document American Indian history and culture in Wisconsin. This position would also support the Society’s compliance with the Native

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¹ 1.00 FTE Curator (\$17.95 per hour, 9 months)	\$28,000
Fringe Benefits (at a rate of 46.92%)	13,100
Travel, supplies, & equipment to support Curator	2,000
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FY 2020 Total	\$43,100
² 1.00 FTE Curator (\$17.95 per hour, 12 months)	\$37,300
Fringe Benefits (at a rate of 46.92%)	17,500
Travel, supplies, & equipment to support Curator	2,000
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FY 2021 Total	\$56,800

American Graves Protection and Repatriation Act (NAGPRA) through consultation and documentation as required by federal law.

The Curator of American Indian Collections is critical to accurately and authentically representing Native American history and ethnic diversity, developing key content and a plan for acquisitions for new collections, developing exhibitions in a new state history museum and implementing effective use of SAPF.

Proposed Benefits

A Curator of American Indian Collections would provide many important services for the Society and Native nations including:

1. Assisting Native nations in gathering information on, and access to, objects collections related to American Indian history and heritage.
2. Traveling to and working with Native nations on matters related to the management of cultural heritage assets.
3. Assisting American Indian nations with the loan of collections to tribal museums, schools, cultural centers, or other locations on tribal land.
4. Assisting American Indian nations with requests under NAGPRA. Seeking NAGPRA grant funding for documentation and repatriation and preparing summaries and reports, as needed, to support grant activities.
5. Coordinating and assisting tribal elders and spiritual leaders with the use of the American Indian ceremonial space at SAPF.
6. Working on the development of American Indian storylines and interpretation of permanent and temporary exhibitions needed in the development of a new history museum.
7. Assisting tribal representatives and researchers in accessing collection documentation.

Twelve distinct American Indian nations call Wisconsin home, including 11 federally recognized tribes – more than any state east of the Mississippi River. Providing these critical services will address a significant need that the Society cannot provide currently.

Decision Item by Line

1921 Biennial Budget

	CODES	TITLES
DEPARTMENT	245	Historical Society
	CODES	TITLES
DECISION ITEM	4003	Curator of American Indian Collections

Expenditure items		1st Year Cost	2nd Year Cost
01	Permanent Position Salaries	\$28,000	\$37,300
02	Turnover	\$0	\$0
03	Project Position Salaries	\$0	\$0
04	LTE/Misc. Salaries	\$0	\$0
05	Fringe Benefits	\$13,100	\$17,500
06	Supplies and Services	\$2,000	\$2,000
07	Permanent Property	\$0	\$0
08	Unalloted Reserve	\$0	\$0
09	Aids to Individuals Organizations	\$0	\$0
10	Local Assistance	\$0	\$0
11	One-time Financing	\$0	\$0
12	Debt Service	\$0	\$0
13	Special Purpose	\$0	\$0
14		\$0	\$0
15		\$0	\$0
16		\$0	\$0
17	Total Cost	\$43,100	\$56,800

18	Project Positions Authorized	0.00	0.00
19	Classified Positions Authorized	1.00	1.00
20	Unclassified Positions Authorized	0.00	0.00

Decision Item by Numeric

Historical Society

Program	Decision Item/Numeric	1st Year Total	2nd Year Total	1st Year FTE	2nd Year FTE
	4003	Curator of American Indian Collections			
01	History services				
	38 Storage facility	\$43,100	\$56,800	1.00	1.00
	History services SubTotal	\$43,100	\$56,800	1.00	1.00
	Curator of American Indian Collections SubTotal	\$43,100	\$56,800	1.00	1.00
	Agency Total	\$43,100	\$56,800	1.00	1.00

Decision Item by Fund Source

Historical Society

	Source of Funds		1st Year Total	2nd Year Total	1st Year FTE	2nd Year FTE
Decision Item	4003	Curator of American Indian Collections				
	PR	S	\$43,100	\$56,800	1.00	1.00
	Total		\$43,100	\$56,800	1.00	1.00
Agency Total			\$43,100	\$56,800	1.00	1.00

Decision Item (DIN) - 4004

Decision Item (DIN) Title - National History Day Program

NARRATIVE

Please see attachment for details.



2019-21 Biennial Budget Request

National History Day Program

Executive Summary

The Wisconsin Historical Society (Society) requests \$127,300¹ GPR 101 and 2.00 FTE in FY 2020 and \$154,700² in FY 2021 to fully fund the Society's flagship educational program, National History Day. This year-long program helps transform students into engaged citizens, enables teachers in secondary schools throughout the state to meet standards established by the Department of Public Instruction (DPI), and allows the Society to fulfill its mission and education-related statutory requirements.

Background

The Society partners with nearly 200 teachers in 43 counties to implement the National History Day program. The program is particularly well-suited to address the new educational standards adopted in 2018 by DPI, which are based on processes such as inquiry and research rather than on content mastery. Its purpose is to teach young people in grades 6-12 how to think critically about the world and their place in it. About 17,000 students in 200 classrooms around the state participate each year, making Wisconsin's program one of the top ten in the country.

By investigating historical documents, organizing an argument based on evidence, and presenting it in public, the students develop problem-solving ability, research and literacy skills, personal confidence, and self-esteem. They produce films, research papers, websites, exhibits, and performances that are shared at regional, statewide, and national contests where they have to defend their work before expert judges.

The Society organizes and executes six regional competitions around the state as well as the state competition. Educators rely on logistical support from Society staff, who visit classrooms, conduct workshops, and provide materials, all of which are critical to the implementation and success of the program.

Justification/Need

The National History Day program is currently significantly understaffed and historically underfunded. In FY 2018, the Society was unable to accommodate dozens of teacher requests to participate. Sustainable, ongoing funding would allow the Society to continue its leadership role and allow the program to reach all counties of the state and historically underserved students.

Proposed Solution and Benefits

Providing support and permanent position authority for National History Day will ensure the continuation of this important initiative. By teaching students how to do history rather than just memorize names and dates, National History Day develops analytical skills that last a lifetime and arm middle and high school students with the skills necessary to graduate high school and succeed into higher education. National History Day enables school districts that have limited financial resources, such as impoverished rural and inner city schools, to exceed the bare minimum of classroom offerings. It makes similar opportunities available to charter schools, private schools, and parents who are educating their children at home.

¹ 2.00 FTE Education Specialist (\$17.95 per hour, 9 months)	\$56,000
Fringe Benefits (at a rate of 46.92%)	26,300
Travel, supplies, & services to support NHD program	45,000
FY 2020 Total	\$127,300
² 2.00 FTE Education Specialist (\$17.95 per hour, 12 months)	\$74,700
Fringe Benefits (at a rate of 46.92%)	35,000
Travel, supplies, & services to support NHD program	45,000
FY 2021 Total	\$154,700

Decision Item by Line

1921 Biennial Budget

	CODES	TITLES
DEPARTMENT	245	Historical Society
	CODES	TITLES
DECISION ITEM	4004	National HistoryDay Program

Expenditure items		1st Year Cost	2nd Year Cost
01	Permanent Position Salaries	\$56,000	\$74,700
02	Turnover	\$0	\$0
03	Project Position Salaries	\$0	\$0
04	LTE/Misc. Salaries	\$0	\$0
05	Fringe Benefits	\$26,300	\$35,000
06	Supplies and Services	\$45,000	\$45,000
07	Permanent Property	\$0	\$0
08	Unalloted Reserve	\$0	\$0
09	Aids to Individuals Organizations	\$0	\$0
10	Local Assistance	\$0	\$0
11	One-time Financing	\$0	\$0
12	Debt Service	\$0	\$0
13	Special Purpose	\$0	\$0
14		\$0	\$0
15		\$0	\$0
16		\$0	\$0
17	Total Cost	\$127,300	\$154,700

18	Project Positions Authorized	0.00	0.00
19	Classified Positions Authorized	2.00	2.00
20	Unclassified Positions Authorized	0.00	0.00

Decision Item by Numeric

Historical Society

Program	Decision Item/Numeric	1st Year Total	2nd Year Total	1st Year FTE	2nd Year FTE
	4004	National History Day Program			
01	History services				
	01 General program operations	\$127,300	\$154,700	2.00	2.00
	History services SubTotal	\$127,300	\$154,700	2.00	2.00
	National History Day Program SubTotal	\$127,300	\$154,700	2.00	2.00
	Agency Total	\$127,300	\$154,700	2.00	2.00

Decision Item by Fund Source

Historical Society

	Source of Funds		1st Year Total	2nd Year Total	1st Year FTE	2nd Year FTE
Decision Item	4004	National History Day Program				
	GPR	S	\$127,300	\$154,700	2.00	2.00
	Total		\$127,300	\$154,700	2.00	2.00
Agency Total			\$127,300	\$154,700	2.00	2.00

Decision Item (DIN) - 4005

Decision Item (DIN) Title - Maritime Archaeology Program

NARRATIVE

Please see attachment for details.



2019-21 Biennial Budget Request

Maritime Preservation Program

Executive Summary

The Wisconsin Historical Society (Society) requests one-time funding in the amount of \$150,000 GPR for the necessary replacement of its 45-year-old research vessel that is reaching the end of its engineered life span. The replacement of this vessel is crucial to ensure the safety of Society employees and volunteers, the stewardship and protection of irreplaceable submerged cultural resources, and adherence to the Society's statutory mandate under Wis. Stat. §44.47(5m).

Background

The State Archaeology and Maritime Preservation Program at the Society is the preeminent program in America and actively researches and documents Wisconsin's rich submerged heritage resources, including shipwrecks and other underwater non-renewal cultural resources. The program employs cutting-edge technology to record Wisconsin's irreplaceable maritime heritage and to make this new information available to the students, teachers, and the general public through an aggressive tourism initiative – Wisconsin's Maritime Trails. The program fills a key role in the Society's mission to collect, preserve, and share Wisconsin stories.

The Maritime Program delivers innovative programming to state, regional, and national audiences through personal appearances by speakers/researchers, museum displays, partnerships, websites, social media, traditional media, and Wisconsin's Maritime Trails initiative. Programming reaches specialized avocational groups, professionals, K-12 students and teachers, and a seemingly unlimited general audience. This diversified array of outreach activities reaches an average audience of approximately 200,000 people annually.

Justification/Need

Wisconsin's rich maritime history is key to understanding the central role shipping played in the expansion of the United States and the development of the industrial and agricultural core now recognized as the Midwest. It is also pivotal to understanding the critical role the Great Lakes continue to play in Wisconsin's economy and in people's lives. The program supports the Society's initiative to reach a broader, diverse audience, and bring the Society's programs to all corners of the state and beyond.

Using increasingly innovative technology, the Society is able to conduct field research, mentor and educate students, and engage in public outreach. The Society's program will face challenges in embracing the new technology and in meeting the new professional standards without a new research vessel. The 1974 Boston whaler that currently serves as the program's research vessel is 45 years old and has identified issues with the structural integrity of its hull. The vessel is not a viable option for long-term use in the Great Lakes, particularly the extreme conditions of Lake Superior, and would put Society employees and volunteers at risk. Moreover, the configuration of the current vessel is outdated for the use of new remote sensing technologies.

A reliable research vessel is a key element to maintaining the Archaeology and Maritime Preservation Program's status as an innovator, to attracting new partners, and central to meeting anticipated research standards of the profession in the future.

Proposed Solution

Purchasing a replacement vessel is essential to the maintenance of an active field research component that is the foundation of the Archaeology and Maritime Preservation Program's success and is the only viable option. Staffing, public education activities, and unpredictable weather on the Great Lakes make short-term rentals and charters

costly and unworkable. Additionally, the Society will not have the ability to utilize vessels or technologies of federal or other partner organizations.

The cost of a replacement incorporates a new vessel with the capacity to utilize cutting-edge technologies as well as a new motor and trailer.

Proposed Benefits

A new research vessel will provide a platform for the use of cutting-edge technological innovations and insure that the program can remain at the forefront of maritime research into the 21st century. A new vessel will also insure that the Society continues to meet all safety standards and regulations.

Supporting this vital equipment will help the State Archaeology and Maritime Preservation maintain its distinguished position nationally. Students, teachers, and the public will continue to benefit from this program and the important information it captures about Wisconsin's rich maritime history.

Decision Item by Line

1921 Biennial Budget

	CODES	TITLES
DEPARTMENT	245	Historical Society
	CODES	TITLES
DECISION ITEM	4005	Maritime Archaeology Program

Expenditure items		1st Year Cost	2nd Year Cost
01	Permanent Position Salaries	\$0	\$0
02	Turnover	\$0	\$0
03	Project Position Salaries	\$0	\$0
04	LTE/Misc. Salaries	\$0	\$0
05	Fringe Benefits	\$0	\$0
06	Supplies and Services	\$0	\$0
07	Permanent Property	\$150,000	\$0
08	Unalloted Reserve	\$0	\$0
09	Aids to Individuals Organizations	\$0	\$0
10	Local Assistance	\$0	\$0
11	One-time Financing	\$0	\$0
12	Debt Service	\$0	\$0
13	Special Purpose	\$0	\$0
14		\$0	\$0
15		\$0	\$0
16		\$0	\$0
17	Total Cost	\$150,000	\$0

18	Project Positions Authorized	0.00	0.00
19	Classified Positions Authorized	0.00	0.00
20	Unclassified Positions Authorized	0.00	0.00

Decision Item by Numeric

Historical Society

Program	Decision Item/Numeric	1st Year Total	2nd Year Total	1st Year FTE	2nd Year FTE
	4005	Maritime Archaeology Program			
01	History services				
	01 General program operations	\$150,000	\$0	0.00	0.00
	History services SubTotal	\$150,000	\$0	0.00	0.00
	Maritime Archaeology Program SubTotal	\$150,000	\$0	0.00	0.00
	Agency Total	\$150,000	\$0	0.00	0.00

Decision Item by Fund Source

Historical Society

	Source of Funds			1st Year Total	2nd Year Total	1st Year FTE	2nd Year FTE	
Decision Item	4005	Maritime Archaeology Program						
	GPR	S	\$150,000	\$0	0.00	0.00		
	Total		\$150,000	\$0	0.00	0.00		
Agency Total			\$150,000	\$0	0.00	0.00		

ACT 201

Proposal under s. 16.42(4)(b)2.: **0% change in each fiscal year**

FY: **FY20**

Agency: **WHS - 245**

Exclusions: Federal
Debt Service

Columns A-G were prepopulated for agencies to reflect state operations adjusted base and reductions agreed to by DOA and LFB. See Appendix H for instructions on how to complete these templates.

Proposed \$ and Proposed FTE columns reflect total agency proposed spending and positions for indicated fiscal year. These amounts should include standard budget adjustments (SBAs), any proposed reallocations or reductions to meet the target, and any other requests that the agency would want considered under this proposal.

Appropriations with zero dollars and zero FTEs are not loaded into the template. If you have any questions, contact your SBO analyst.

IF YOUR AGENCY PLANS TO TAKE THE SAME CUTS OVER BOTH YEARS, YOU SHOULD ONLY FILL OUT ONE GRID FOR 0% GROWTH AND ONE GRID FOR 5% REDUCTION, THEN CHANGE FY20 TO FY20 AND 21.

Agency	Appropriation		Fund Source	Adjusted Base		(See Note 1)	Proposed Budget 2019-20		Item Ref.	Change from Adj Base		(See Note 2)		Change from Adjusted Base after Removal of SBAs	
	Alpha	Numeric		\$	FTE	0% Change Target	Proposed \$	Proposed FTE		\$	FTE	Remove SBAs \$	FTE	\$	FTE
245	1a	101	GPR	14,880,900	97.15	0	14,984,600	115.65		103,700	18.50	267,200	0.00	370,900	18.50
245	1c	105	GPR	740,600	0.00	0	740,600	0.00		0	0.00	0	0.00	0	0.00
245	1h	127	PR	100,000	0.00	0	100,000	0.00		0	0.00	0	0.00	0	0.00
245	1h	132	PR	722,900	5.00	0	770,100	7.50	1	47,200	2.50	(97,200)	0.00	(50,000)	2.50
245	1k	138	PR-S	201,100	0.00	0	1,176,700	4.00		975,600	4.00	(932,500)	0.00	43,100	4.00
245	1km	136	PR-S	223,100	2.75	0	246,300	2.75		23,200	0.00	(23,200)	0.00	0	0.00
245	1ks	137	PR-S	1,597,300	8.50	0	1,532,100	11.50	1	(65,200)	3.00	1,200	0.00	(64,000)	3.00
245	1kw	120	PR-S	265,100	2.00	0	261,900	2.00		(3,200)	0.00	3,200	0.00	0	0.00
245	1q	161	SEG	574,800	2.25	0	613,800	3.25		39,000	1.00	(39,000)	0.00	0	1.00
245	1r	163	SEG	4,076,600	9.53	0	3,880,600	29.03	1	(196,000)	19.50	(104,000)	0.00	(300,000)	19.50
245	1y	164	SEG	53,500	1.00	0	66,100	1.00		12,600	0.00	(12,600)	0.00	0	0.00
Totals				23,435,900	128.18	0	24,372,800	176.68		936,900	48.50	(936,900)	0.00	0	48.50

Note 1: Reduction target must be met within state operations appropriations, but may be allocated across those appropriations and fund sources.

Note 2: Amounts should be SBAs (DINs 3001 - 3011) from agency request multiplied by -1.

Target Reduction = 0

Difference = 0
Should equal \$0

Items - Describe proposed changes (excl. SBAs) to reach target or other priorities of agency

- 1 The Historical Society would use a combination of methods to reach the 0% reduction target, including use of existing cash balances in available appropriations, cost reductions, and strategic position management
- 2
- 3

ACT 201

Proposal under s. 16.42(4)(b)1.: 5% change in each fiscal year

FY: **FY20**

Agency: **WHS - 245**

Exclusions: Federal
Debt Service

Columns A-G were prepopulated for agencies to reflect state operations adjusted base and reductions agreed to by DOA and LFB. See Appendix H for instructions on how to complete these templates.

Proposed \$ and Proposed FTE columns reflect total agency proposed spending and positions for indicated fiscal year. These amounts should include standard budget adjustments (SBAs), any proposed reallocations or reductions to meet the target, and any other requests that the agency would want considered under this proposal.

Appropriations with zero dollars and zero FTEs are not loaded into the template. If you have any questions, contact your SBO analyst.

IF YOUR AGENCY PLANS TO TAKE THE SAME CUTS OVER BOTH YEARS, YOU SHOULD ONLY FILL OUT ONE GRID FOR 0% GROWTH AND ONE GRID FOR 5% REDUCTION, THEN CHANGE FY20 TO FY20 AND 21.

Agency	Appropriation		Fund Source	Adjusted Base		(See Note 1)	Proposed Budget 2019-20		Item Ref.	Change from Adj Base		(See Note 2)		Change from Adjusted Base after Removal of SBAs	
	Alpha	Numeric		\$	FTE	5% Reduction Target	Proposed \$	Proposed FTE		\$	FTE	Remove SBAs	FTE	\$	FTE
245	1a	101	GPR	14,880,900	97.15	(744,000)	14,984,600	115.65		103,700	18.50	267,200	0.00	370,900	18.50
245	1c	105	GPR	740,600	0.00	(37,000)	740,600	0.00		0	0.00	0	0.00	0	0.00
245	1h	127	PR	100,000	0.00	(5,000)	75,000	0.00	1	(25,000)	0.00	0	0.00	(25,000)	0.00
245	1h	132	PR	722,900	5.00	(36,100)	620,100	7.50	1	(102,800)	2.50	(97,200)	0.00	(200,000)	2.50
245	1k	138	PR-S	201,100	0.00	(10,100)	1,176,700	4.00		975,600	4.00	(932,500)	0.00	43,100	4.00
245	1km	136	PR-S	223,100	2.75	(11,200)	246,300	2.75		23,200	0.00	(23,200)	0.00	0	0.00
245	1ks	137	PR-S	1,597,300	8.50	(79,900)	1,251,100	11.50	1	(346,200)	3.00	1,200	0.00	(345,000)	3.00
245	1kw	120	PR-S	265,100	2.00	(13,300)	261,900	2.00		(3,200)	0.00	3,200	0.00	0	0.00
245	1q	161	SEG	574,800	2.25	(28,700)	483,800	3.25	1	(91,000)	1.00	(39,000)	0.00	(130,000)	1.00
245	1r	163	SEG	4,076,600	9.53	(203,800)	3,294,800	29.03	1	(781,800)	19.50	(104,000)	0.00	(885,800)	19.50
245	1y	164	SEG	53,500	1.00	(2,700)	66,100	1.00		12,600	0.00	(12,600)	0.00	0	0.00
Totals				23,435,900	128.18	(1,171,800)	23,201,000	176.68		(234,900)	48.50	(936,900)	0.00	(1,171,800)	48.50

Note 1: Reduction target must be met within state operations appropriations, but may be allocated across those appropriations and fund sources.

Note 2: Amounts should be SBAs (DINs 3001 - 3011) from agency request multiplied by -1.

Target Reduction = (1,171,800)

Difference = **0**
Should equal \$0

Items - Describe proposed changes (excl. SBAs) to reach target or other priorities of agency

- 1 The Historical Society would use a combination of methods to reach the 5% reduction target, including use of existing cash balances in available appropriations, cost reductions, and strategic position management
- 2
- 3
- 4
- 5

ACT 201

Proposal under s. 16.42(4)(b)2.: 0% change in each fiscal year

FY: **FY21**
 Agency: **WHS - 245**

IF YOUR AGENCY PLANS TO TAKE THE SAME CUTS OVER BOTH YEARS, YOU SHOULD ONLY FILL OUT ONE GRID FOR 0% GROWTH AND ONE GRID FOR 5% REDUCTION, THEN CHANGE FY20 TO FY20 AND 21.

Agency	Appropriation		Fund Source	Adjusted Base		(See Note 1) 0% Change Target	Proposed Budget 2020-21		Item Ref.	Change from Adj Base		(See Note 2) Remove SBAs		Change from Adjusted Base after Removal of SBAs	
	Alpha	Numeric		\$	FTE		Proposed \$	Proposed FTE		\$	FTE	\$	FTE	\$	FTE
245	1a	101	GPR	14,880,900	97.15	0	14,950,100	115.65		69,200	18.50	196,900	0.00	266,100	18.50
245	1c	105	GPR	740,600	0.00	0	740,600	0.00		0	0.00	0	0.00	0	0.00
245	1h	127	PR	100,000	0.00	0	100,000	0.00		0	0.00	0	0.00	0	0.00
245	1h	132	PR	722,900	5.00	0	797,200	7.50		74,300	2.50	(97,200)	0.00	(22,900)	2.50
245	1k	138	PR-S	201,100	0.00	0	1,213,500	4.00		1,012,400	4.00	(955,600)	0.00	56,800	4.00
245	1km	136	PR-S	223,100	2.75	0	246,300	2.75		23,200	0.00	(23,200)	0.00	0	0.00
245	1ks	137	PR-S	1,597,300	8.50	0	1,496,900	11.50		(100,400)	3.00	400	0.00	(100,000)	3.00
245	1kw	120	PR-S	265,100	2.00	0	261,900	2.00		(3,200)	0.00	3,200	0.00	0	0.00
245	1q	161	SEG	574,800	2.25	0	613,800	3.25		39,000	1.00	(39,000)	0.00	0	1.00
245	1r	163	SEG	4,076,600	9.53	0	3,980,600	29.03		(96,000)	19.50	(104,000)	0.00	(200,000)	19.50
245	1y	164	SEG	53,500	1.00	0	66,100	1.00		12,600	0.00	(12,600)	0.00	0	0.00
Totals				23,435,900	128.18	0	24,467,000	176.68		1,031,100	48.50	(1,031,100)	0.00	0	48.50

Note 1: Reduction target must be met within state operations appropriations, but may be allocated across those appropriations and fund sources.

Note 2: Amounts should be SBAs (DINs 3001 - 3011) from agency request multiplied by -1.

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ACT 201

Proposal under s. 16.42(4)(b)1.: 5% change in each fiscal year

FY: **FY21**
 Agency: **WHS - 245**

IF YOUR AGENCY PLANS TO TAKE THE SAME CUTS OVER BOTH YEARS, YOU SHOULD ONLY FILL OUT ONE GRID FOR 0% GROWTH AND ONE GRID FOR 5% REDUCTION, THEN CHANGE FY20 TO FY20 AND 21.

Agency	Appropriation Alpha	Numeric	Fund Source	(See Note 1)			Proposed Budget 2020-21		Item Ref.	Change from Adj Base		(See Note 2)		Change from Adjusted Base after Removal of SBAs	
				Adjusted Base \$	FTE	5% Reduction Target	Proposed \$	Proposed FTE		\$	FTE	Remove SBAs \$	FTE	\$	FTE
245	1a	101	GPR	14,880,900	97.15	(744,000)	14,950,100	115.65		69,200	18.50	196,900	0.00	266,100	18.50
245	1c	105	GPR	740,600	0.00	(37,000)	740,600	0.00		0	0.00	0	0.00	0	0.00
245	1h	127	PR	100,000	0.00	(5,000)	75,000	0.00		(25,000)	0.00	0	0.00	(25,000)	0.00
245	1h	132	PR	722,900	5.00	(36,100)	620,100	7.50		(102,800)	2.50	(97,200)	0.00	(200,000)	2.50
245	1k	138	PR-S	201,100	0.00	(10,100)	1,213,500	4.00		1,012,400	4.00	(955,600)	0.00	56,800	4.00
245	1km	136	PR-S	223,100	2.75	(11,200)	246,300	2.75		23,200	0.00	(23,200)	0.00	0	0.00
245	1ks	137	PR-S	1,597,300	8.50	(79,900)	1,251,900	11.50		(345,400)	3.00	400	0.00	(345,000)	3.00
245	1kw	120	PR-S	265,100	2.00	(13,300)	261,900	2.00		(3,200)	0.00	3,200	0.00	0	0.00
245	1q	161	SEG	574,800	2.25	(28,700)	513,800	3.25		(61,000)	1.00	(39,000)	0.00	(100,000)	1.00
245	1r	163	SEG	4,076,600	9.53	(203,800)	3,355,900	29.03		(720,700)	19.50	(104,000)	0.00	(824,700)	19.50
245	1y	164	SEG	53,500	1.00	(2,700)	66,100	1.00		12,600	0.00	(12,600)	0.00	0	0.00
Totals				23,435,900	128.18	(1,171,800)	23,295,200	176.68		(140,700)	48.50	(1,031,100)	0.00	(1,171,800)	48.50

Note 1: Reduction target must be met within state operations appropriations, but may be allocated across those appropriations and fund sources.

Note 2: Amounts should be SBAs (DINs 3001 - 3011) from agency request multiplied by -1.

Target Reduction = (1,171,800)

Difference = **0**
 Should equal \$0

Items - Describe proposed changes (excl. SBAs) to reach target or other priorities of agency

- 1 The Historical Society would use a combination of methods to reach the 5% reduction target, including use of existing cash balances in available appropriations, cost reductions, and strategic position management
- 2
- 3
- 4
- 5

BASE BUDGET REVIEW REPORTS

Please indicate any appropriation whose minimum level of funding to achieve objectives is less than the prior fiscal year's base funding [s. 16.423(3)(d)]. Add rows to the table as needed.

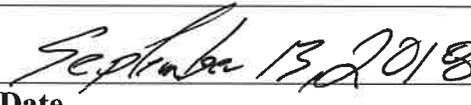
Chapter 20 Appropriation	Title	Prior Fiscal Year Budget	Prior Fiscal Year Expended	Minimum Budget Needed

The agency's mission and objectives can be found in the biennial budget submission at the following URL [s. 16.423(3)(e)]:
<https://doa.wi.gov/Pages/StateFinances/CurrentBiennialBudget.aspx>. Please create an agency mission if your agency does not currently have a mission to include in its agency budget request.

OPTIONAL ANALYSIS

This section is available to agencies that want to describe why expenditures varied throughout fiscal quarters and/or years.

20.245(c) – Energy Costs; energy-related assessments. FY2018 Q4 shows minimal expenses because agency costs exceeded the appropriation amount and the agency was required to use other operating funding sources.

 Signature, Title	 Date
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