

HISTORICAL SOCIETY

GOVERNOR'S BUDGET RECOMMENDATIONS

Source of Funds	FY19 Adjusted Base	FY20 Recommended	% Change Over FY19	FY21 Recommended	% Change Over FY20
GPR	20,114,100	21,543,700	7.1	21,590,100	0.2
PR-F	1,356,500	1,382,700	1.9	1,382,800	0.0
PR-O	1,095,900	1,082,500	-1.2	1,326,500	22.5
PR-S	2,286,600	2,312,500	1.1	2,313,300	0.0
SEG-O	4,704,900	4,860,500	3.3	4,860,500	0.0
TOTAL	29,558,000	31,181,900	5.5	31,473,200	0.9

FULL-TIME EQUIVALENT POSITION SUMMARY

Source of Funds	FY19 Adjusted Base	FY20 Recommended	FTE Change Over FY19	FY21 Recommended	FTE Change Over FY20
GPR	97.15	98.15	1.00	98.15	0.00
PR-F	6.86	6.86	0.00	6.86	0.00
PR-O	5.00	5.00	0.00	5.00	0.00
PR-S	13.25	13.25	0.00	13.25	0.00
SEG-O	12.78	12.78	0.00	12.78	0.00
TOTAL	135.04	136.04	1.00	136.04	0.00

AGENCY DESCRIPTION

Founded in 1846, prior to statehood, the society is governed by a board of curators comprised of: 24 individuals elected by the society's members; the Governor or his/her designee; a member of the majority and minority parties from the Senate and Assembly; three members nominated by the Governor with the advice and consent of the Senate; and four additional ex officio members designated by the society's constitution. The board appoints the director, the administrative head of the agency.

Historical Society

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

Division of Library, Archives, and Museum Collections

The society operates the world's largest library and archives dedicated exclusively to North American history on behalf of Wisconsin citizens, an international array of scholars, and the University of Wisconsin, for which the society serves as the North American history library. Its extensive collections include nearly four million books, pamphlets, newspapers, government records, business records, maps, unpublished archival items, personal memoirs, diaries and journals, as well as four million historic photographs.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 12 historic sites, which share stories of Wisconsin's physical and cultural heritage. These sites also promote tourism and economic development.

State Historic Preservation Office

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

MISSION

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

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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, 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 the State Archive Preservation Facility (SAPF).

Objective/Activity: Provide valued service and unparalleled access to the 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 society facilities and reduce deferred maintenance.

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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 SAPF.

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) books sold or distributed.	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. ¹	47,000	51,817	48,000	54,764

Note: Based on fiscal year.

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

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2019, 2020 AND 2021 GOALS

Prog. No.	Performance Measure	Goal 2019 ¹	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 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.	17,000	17,250	17,500
1.	Number of local history affiliate consultations.	700	750	750
1.	People engaged in new museum development process. ²	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). ²	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 Web site content. ²	4,800,000	4,800,000	4,800,000
1.	Total Wisconsin Historical Society members. ²	12,800	13,000	13,500
1.	Value of deferred maintenance at WHS facilities. ²	\$11,400,000	\$10,900,000	\$10,400,000

Note: Based on fiscal year.

¹Some goals for 2019 have been revised or removed.

²New performance measure for 2019-21 biennium.

³Includes Circus World Museum attendance for entire fiscal year and assumes Wisconsin Historical Museum closing in fiscal year 2019-20.

HISTORICAL SOCIETY

GOVERNOR'S BUDGET RECOMMENDATIONS

RECOMMENDATIONS

1. Curator of American Indian Collections
2. Fuel and Utilities Reestimate
3. Debt Service Reestimate
4. Standard Budget Adjustments

ITEMS NOT APPROVED

5. Creating an Efficient, Effective and Equitable Workforce
6. Safety and Security
7. National History Day Program
8. Maritime Archaeology Program

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

	ACTUAL FY18	ADJUSTED BASE FY19	AGENCY REQUEST FY20	AGENCY REQUEST FY21	GOVERNOR'S RECOMMENDATION FY20	GOVERNOR'S RECOMMENDATION FY21
GENERAL PURPOSE REVENUE	\$17,842.8	\$20,114.1	\$20,217.8	\$20,183.3	\$21,543.7	\$21,590.1
State Operations	17,758.3	20,029.6	20,133.3	20,098.8	21,459.2	21,505.6
Aids to Ind. & Org.	84.5	84.5	84.5	84.5	84.5	84.5
FEDERAL REVENUE (1)	\$1,252.0	\$1,356.5	\$1,400.1	\$1,382.8	\$1,382.7	\$1,382.8
State Operations	1,252.0	1,356.5	1,400.1	1,382.8	1,382.7	1,382.8
PROGRAM REVENUE (2)	\$4,280.3	\$3,382.5	\$4,474.1	\$4,511.7	\$3,395.0	\$3,639.8
State Operations	4,280.3	3,382.5	4,474.1	4,511.7	3,395.0	3,639.8
SEGREGATED REVENUE (3)	\$4,129.7	\$4,704.9	\$4,860.5	\$4,860.5	\$4,860.5	\$4,860.5
State Operations	4,129.7	4,704.9	4,860.5	4,860.5	4,860.5	4,860.5
TOTALS - ANNUAL	\$27,504.8	\$29,558.0	\$30,952.5	\$30,938.3	\$31,181.9	\$31,473.2
State Operations	27,420.3	29,473.5	30,868.0	30,853.8	31,097.4	31,388.7
Aids to Ind. & Org.	84.5	84.5	84.5	84.5	84.5	84.5

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

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

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

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

	ADJUSTED BASE FY19	AGENCY REQUEST FY20	AGENCY REQUEST FY21	GOVERNOR'S RECOMMENDATION FY20	GOVERNOR'S RECOMMENDATION FY21
GENERAL PURPOSE REVENUE	97.15	115.65	115.65	98.15	98.15
FEDERAL REVENUE (1)	6.86	8.86	8.86	6.86	6.86
PROGRAM REVENUE (2)	18.25	27.75	27.75	18.25	18.25
SEGREGATED REVENUE (3)	12.78	33.28	33.28	12.78	12.78
TOTALS - ANNUAL	135.04	185.54	185.54	136.04	136.04

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

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

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

(4) All positions are State Operations unless otherwise specified

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

	ACTUAL FY18	ADJUSTED BASE FY19	AGENCY REQUEST		GOVERNOR'S RECOMMENDATION	
			FY20	FY21	FY20	FY21
1. History services	\$27,504.8	\$29,558.0	\$30,952.5	\$30,938.3	\$31,181.9	\$31,473.2
TOTALS	\$27,504.8	\$29,558.0	\$30,952.5	\$30,938.3	\$31,181.9	\$31,473.2

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

	ADJUSTED BASE FY19	AGENCY REQUEST		GOVERNOR'S RECOMMENDATION	
		FY20	FY21	FY20	FY21
1. History services	135.04	185.54	185.54	136.04	136.04
TOTALS	135.04	185.54	185.54	136.04	136.04

(4) All positions are State Operations unless otherwise specified

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1. Curator of American Indian Collections

Source of Funds	Agency Request				Governor's Recommendations			
	FY20		FY21		FY20		FY21	
	Dollars	Positions	Dollars	Positions	Dollars	Positions	Dollars	Positions
GPR	0	0.00	0	0.00	43,100	1.00	56,800	1.00
PR-S	43,100	1.00	56,800	1.00	0	0.00	0	0.00
TOTAL	43,100	1.00	56,800	1.00	43,100	1.00	56,800	1.00

The Governor recommends providing position and expenditure authority to support a curator of American Indian Collections, headquartered at the State Archive Preservation Facility. The curator will work with federally-recognized Tribes regarding the management of cultural heritage assets, loans of collection materials and accessing collection documentation.

2. Fuel and Utilities Reestimate

Source of Funds	Agency Request				Governor's Recommendations			
	FY20		FY21		FY20		FY21	
	Dollars	Positions	Dollars	Positions	Dollars	Positions	Dollars	Positions
GPR	0	0.00	0	0.00	162,700	0.00	173,800	0.00
TOTAL	0	0.00	0	0.00	162,700	0.00	173,800	0.00

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

3. Debt Service Reestimate

Source of Funds	Agency Request				Governor's Recommendations			
	FY20		FY21		FY20		FY21	
	Dollars	Positions	Dollars	Positions	Dollars	Positions	Dollars	Positions
GPR	0	0.00	0	0.00	565,600	0.00	493,800	0.00
PR-O	0	0.00	0	0.00	-110,600	0.00	133,400	0.00
TOTAL	0	0.00	0	0.00	455,000	0.00	627,200	0.00

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

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4. Standard Budget Adjustments

Source of Funds	Agency Request				Governor's Recommendations			
	FY20		FY21		FY20		FY21	
	Dollars	Positions	Dollars	Positions	Dollars	Positions	Dollars	Positions
GPR	-267,200	0.00	-196,900	0.00	658,200	0.00	751,600	0.00
PR-F	43,600	0.00	26,300	0.00	26,200	0.00	26,300	0.00
PR-O	97,200	0.00	97,200	0.00	97,200	0.00	97,200	0.00
PR-S	951,300	0.00	975,200	0.00	25,900	0.00	26,700	0.00
SEG-O	155,600	0.00	155,600	0.00	155,600	0.00	155,600	0.00
TOTAL	980,500	0.00	1,057,400	0.00	963,100	0.00	1,057,400	0.00

The Governor recommends adjusting the society's base budget for: (a) turnover reduction (-\$176,400 in each year); (b) full funding of continuing position salaries and fringe benefits (\$1,101,300 in each year); (c) overtime (\$7,300 in each year); (d) night and weekend differential pay (\$12,300 in each year); (e) full funding of lease and directed moves costs (\$18,600 in FY20 and \$112,900 in FY21); and (f) minor transfers within the same alpha appropriation.

ITEMS NOT APPROVED

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

Decision Item	Source of Funds	FY20		FY21	
		Dollars	Positions	Dollars	Positions
5. Creating an Efficient, Effective and Equitable Workforce	GPR	0	15.50	0	15.50
	PR-F	0	2.00	0	2.00
	PR-O	0	2.50	0	2.50
	PR-S	0	6.00	0	6.00
	SEG-O	0	20.50	0	20.50
6. Safety and Security	GPR	93,600	1.00	111,400	1.00
7. National History Day Program	GPR	127,300	2.00	154,700	2.00
8. Maritime Archaeology Program	GPR	150,000	0.00	0	0.00
TOTAL OF ITEMS NOT APPROVED	GPR	370,900	18.50	266,100	18.50
	PR-F	0	2.00	0	2.00
	PR-O	0	2.50	0	2.50
	PR-S	0	6.00	0	6.00
	SEG-O	0	20.50	0	20.50