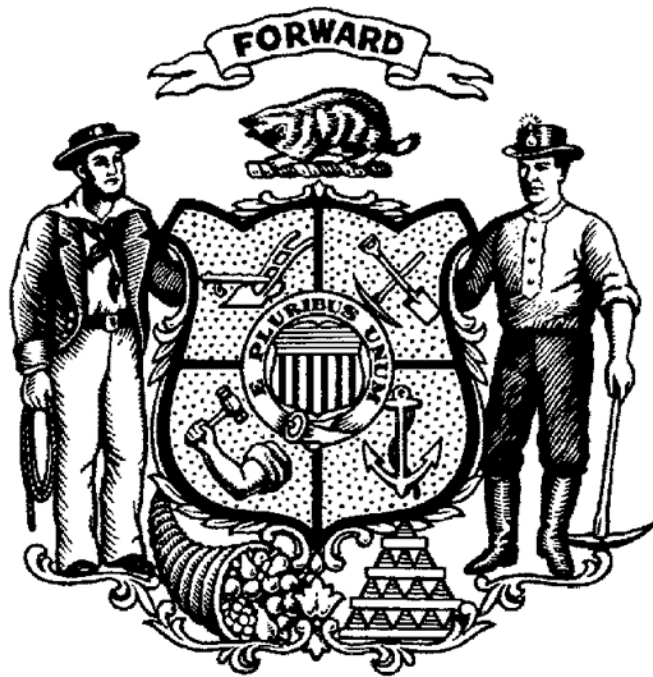


State of Wisconsin

Historical Society



Agency Budget Request

2023 – 2025 Biennium

September 15, 2022

Table of Contents

| | |
|---|----|
| Cover Letter | 3 |
| Description | 4 |
| Mission | 6 |
| Goals | 7 |
| Performance Measures | 9 |
| Organization Chart | 11 |
| Agency Total by Fund Source | 12 |
| Agency Total by Program | 13 |
| Agency Total by Decision Item (DIN) | 15 |
| Program Revenue and Balances Statement | 16 |
| Segregated Revenue and Balances Statement | 23 |
| Decision Items | 26 |
| Act 201 0% Growth and 5% Reduction Plans | 86 |



September 15, 2022

The Honorable Tony Evers
Governor
115 East, State Capitol
Madison, WI 53702

Dear Governor Evers:

The Wisconsin Historical Society (the “Society”) is pleased to submit its 2023-2025 biennial budget request. During the 2023-25 biennium, the Society will strive to improve and increase the services provided to the citizens of Wisconsin in all 72 counties, 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) Unanticipated transitioning of our IT services and support from the University of Wisconsin-Madison, Division of Information Technology to the Department of Administration, Division of Enterprise Technology as required by the University of Wisconsin;
- 2) Planning and preparing to open a new Wisconsin History Center on the Capitol Square in Madison; and
- 3) Establishing an Enterprise Risk Management program to ensure the safety and security of employees, visitors, state properties, and historic collections.

Thank you for your leadership and continued support of the Society’s mission to connect people to the past by collecting, preserving, and sharing stories. We believe that engaging the public to increase their knowledge of relevant history will have profound societal, cultural, and economic benefit for all.

Sincerely,

A handwritten signature in black ink, appearing to read 'Christian W. Overland'.

Christian W. Øverland
The Ruth and Hartley Barker Director

Collecting, Preserving and Sharing Stories Since 1846

816 State Street Madison, Wisconsin 53706

wisconsinhistory.org

AGENCY DESCRIPTION

Founded in 1846, prior to statehood, the Wisconsin Historical Society (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.

Both a state agency and a membership organization, the Society leverages its state support to generate 35 percent of its annual operating budget through earned income, grants, endowments, 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 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. This division also includes the Society's education team, which 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.

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 four main functions: field services, the Wisconsin Historical Society Press, retail services, and event rentals. It 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 Wisconsin Historical Society connects people to the past by collecting, preserving, and sharing stories.

VISION

Enriching and transforming lives through unparalleled access to history.

PROGRAMS, GOALS, OBJECTIVES AND ACTIVITIES

Program 1: History Services

Goal: Expedite the preservation of places of enduring value.

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.

Objective/Activity: Educate Wisconsin residents, property owners and stakeholders on Wisconsin's archaeological, maritime and built environment resources.

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: 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: Advance the Old World Wisconsin master plan to improve quality of guest experience.

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.

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: Develop facility and realize capital funding requirements.

PERFORMANCE MEASURES

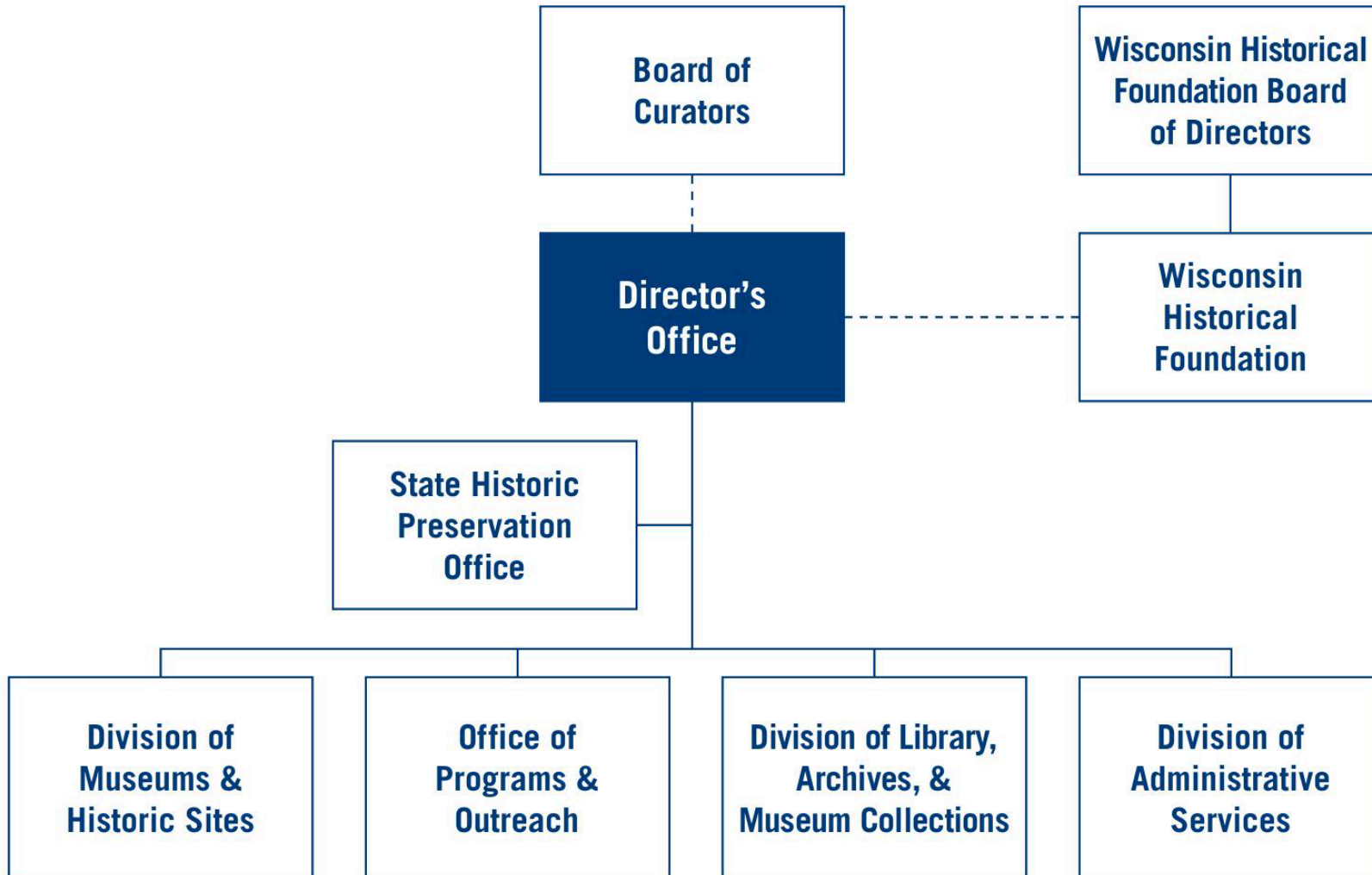
2021 AND 2022 GOALS AND ACTUALS

| Prog. No. | Performance Measure | Goal 2021 | Actual 2021 | Goal 2022 | Actual 2022 |
|-----------|---|---------------|---------------|---------------|---------------|
| 1. | Number of buildings rehabilitated using the rehabilitation tax credit programs. | 300 | 478 | 350 | 453 |
| 1. | Total tax credit project investment. | \$100 million | \$121 million | \$120 million | \$139 million |
| 1. | Number of WHSP books sold or distributed through all channels. | 15,235 | 40,918 | 25,000 | 45,373 |
| 1. | Number of WHSP student titles and textbooks sold and distributed. | 2,500 | 8,248 | 3,125 | 7,162 |
| 1. | Number of participants in National History Day program. | 10,000 | 3,562 | 15,000 | 4,500 |
| 1. | Number of local history affiliate consultations. | 550 | 451 | 600 | 454 |
| 1. | People engaged in new museum development process. | 1,500 | 163 | 1,500 | 320 |
| 1. | Number of collection donations (donor transactions). | 200 | 232 | 215 | 311 |
| 1. | Number of patrons served through State Archives and North American History Library. | 15,000 | 19,352 | 60,000 | 152,755 |
| 1. | Number of agencies provided with e-records assistance. | 15 | 20 | 25 | 10 |
| 1. | Number of local governments served via in-person consultations. | 15 | 79 | 20 | 109 |
| 1. | Attendance at museums and historic sites. | 68,000 | 30,585 | 140,000 | 156,770 |
| 1. | K-12 student attendance at museums and historic sites. | 5,000 | 6,698 | 30,000 | 21,000 |
| 1. | Unique visits to Web site content. | 5,700,000 | 5,705,507 | 5,700,000 | 5,666,588 |
| 1. | Total Wisconsin Historical Society members. | 11,000 | 9,880 | 11,500 | 11,253 |
| 1. | Value of deferred maintenance at WHS facilities. | \$6,808,400 | \$8,072,400 | \$5,396,400 | \$7,728,400 |

2023, 2024 AND 2025 GOALS

| Prog. No. | Performance Measure | Goal 2023 | Goal 2024 | Goal 2025 |
|------------------|---|------------------|------------------|------------------|
| 1. | Number of buildings rehabilitated using the rehabilitation tax credit programs. | 350 | 350 | 350 |
| 1. | Total tax credit project investment. | \$120 million | \$120 million | \$120 million |
| 1. | Number of WHSP books sold or distributed through all channels. | 42,000 | 42,000 | 42,000 |
| 1. | Number of WHSP student titles and textbooks sold and distributed. | 4,000 | 4,000 | 4,000 |
| 1. | Number of participants in National History Day program. | 5,000 | 7,500 | 10,000 |
| 1. | Number of local history affiliate consultations. | 450 | 450 | 450 |
| 1. | People engaged in new museum development process. | 1,000 | 1,000 | 1,000 |
| 1. | Number of collection donations (donor transactions). | 300 | 300 | 300 |
| 1. | Number of patrons served through State Archives and North American History Library. | 150,000 | 150,000 | 150,000 |
| 1. | Number of agencies provided with e-records assistance. | 18 | 20 | 22 |
| 1. | Number of local governments served via in-person consultations. | 100 | 100 | 100 |
| 1. | Attendance at museums and historic sites. | 250,000 | 255,000 | 260,000 |
| 1. | K-12 student attendance at museums and historic sites. | 60,000 | 61,500 | 63,000 |
| 1. | Unique visits to Web site content. | 5,700,000 | 5,700,000 | 5,700,000 |
| 1. | Total Wisconsin Historical Society members. | 12,000 | 12,500 | 13,000 |
| 1. | Value of deferred maintenance at WHS facilities. | \$6M | \$5M | \$4.5M |

Organizational Chart



Agency Total by Fund Source

Historical Society

2325 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 | 0.00% |
| GPR | S | \$21,215,381 | \$21,992,500 | \$24,203,400 | \$24,328,400 | 116.65 | 116.65 | \$43,985,000 | \$48,531,800 | \$4,546,800 | 10.30% |
| Total | | \$21,299,881 | \$22,077,000 | \$24,287,900 | \$24,412,900 | 116.65 | 116.65 | \$44,154,000 | \$48,700,800 | \$4,546,800 | 10.30% |
| PR | S | \$4,970,398 | \$3,551,800 | \$7,138,100 | \$7,158,100 | 24.35 | 24.35 | \$7,103,600 | \$14,296,200 | \$7,192,600 | 101.30% |
| Total | | \$4,970,398 | \$3,551,800 | \$7,138,100 | \$7,158,100 | 24.35 | 24.35 | \$7,103,600 | \$14,296,200 | \$7,192,600 | 101.30% |
| PR Federal | S | \$1,525,259 | \$1,483,900 | \$2,603,900 | \$2,717,500 | 8.86 | 8.86 | \$2,967,800 | \$5,321,400 | \$2,353,600 | 79.30% |
| Total | | \$1,525,259 | \$1,483,900 | \$2,603,900 | \$2,717,500 | 8.86 | 8.86 | \$2,967,800 | \$5,321,400 | \$2,353,600 | 79.30% |
| SEG | S | \$3,847,707 | \$4,203,500 | \$5,728,000 | \$6,721,500 | 32.84 | 32.84 | \$8,407,000 | \$12,449,500 | \$4,042,500 | 48.10% |
| Total | | \$3,847,707 | \$4,203,500 | \$5,728,000 | \$6,721,500 | 32.84 | 32.84 | \$8,407,000 | \$12,449,500 | \$4,042,500 | 48.10% |
| Grand Total | | \$31,643,245 | \$31,316,200 | \$39,757,900 | \$41,010,000 | 182.70 | 182.70 | \$62,632,400 | \$80,767,900 | \$18,135,500 | 29.00% |

Agency Total by Program

Historical Society

2325 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 % |
| 01 History services | | | | | | | | | | |
| Non Federal | | | | | | | | | | |
| GPR | \$21,299,881 | \$22,077,000 | \$24,287,900 | \$24,412,900 | 116.65 | 116.65 | \$44,154,000 | \$48,700,800 | \$4,546,800 | 10.30% |
| A | \$84,500 | \$84,500 | \$84,500 | \$84,500 | 0.00 | 0.00 | \$169,000 | \$169,000 | \$0 | 0.00% |
| S | \$21,215,381 | \$21,992,500 | \$24,203,400 | \$24,328,400 | 116.65 | 116.65 | \$43,985,000 | \$48,531,800 | \$4,546,800 | 10.34% |
| PR | \$4,970,398 | \$3,551,800 | \$7,138,100 | \$7,158,100 | 24.35 | 24.35 | \$7,103,600 | \$14,296,200 | \$7,192,600 | 101.25% |
| S | \$4,970,398 | \$3,551,800 | \$7,138,100 | \$7,158,100 | 24.35 | 24.35 | \$7,103,600 | \$14,296,200 | \$7,192,600 | 101.25% |
| SEG | \$3,847,707 | \$4,203,500 | \$5,728,000 | \$6,721,500 | 32.84 | 32.84 | \$8,407,000 | \$12,449,500 | \$4,042,500 | 48.08% |
| S | \$3,847,707 | \$4,203,500 | \$5,728,000 | \$6,721,500 | 32.84 | 32.84 | \$8,407,000 | \$12,449,500 | \$4,042,500 | 48.08% |
| Total - Non Federal | \$30,117,986 | \$29,832,300 | \$37,154,000 | \$38,292,500 | 173.84 | 173.84 | \$59,664,600 | \$75,446,500 | \$15,781,900 | 26.45% |
| A | \$84,500 | \$84,500 | \$84,500 | \$84,500 | 0.00 | 0.00 | \$169,000 | \$169,000 | \$0 | 0.00% |
| S | \$30,033,486 | \$29,747,800 | \$37,069,500 | \$38,208,000 | 173.84 | 173.84 | \$59,495,600 | \$75,277,500 | \$15,781,900 | 26.53% |
| Federal | | | | | | | | | | |
| PR | \$1,525,259 | \$1,483,900 | \$2,603,900 | \$2,717,500 | 8.86 | 8.86 | \$2,967,800 | \$5,321,400 | \$2,353,600 | 79.30% |
| S | \$1,525,259 | \$1,483,900 | \$2,603,900 | \$2,717,500 | 8.86 | 8.86 | \$2,967,800 | \$5,321,400 | \$2,353,600 | 79.30% |

Agency Total by Program

Historical Society

2325 Biennial Budget

| Source of Funds | Prior Year Total | ANNUAL SUMMARY | | | | | BIENNIAL SUMMARY | | | |
|----------------------------|---------------------|---------------------|---------------------|---------------------|---------------|---------------|-------------------------|---------------------|---------------------|-------------------|
| | | 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 | | | | | | | | | | |
| Total - Federal | \$1,525,259 | \$1,483,900 | \$2,603,900 | \$2,717,500 | 8.86 | 8.86 | \$2,967,800 | \$5,321,400 | \$2,353,600 | 79.30% |
| S | \$1,525,259 | \$1,483,900 | \$2,603,900 | \$2,717,500 | 8.86 | 8.86 | \$2,967,800 | \$5,321,400 | \$2,353,600 | 79.30% |
| PGM 01 Total | \$31,643,245 | \$31,316,200 | \$39,757,900 | \$41,010,000 | 182.70 | 182.70 | \$62,632,400 | \$80,767,900 | \$18,135,500 | 28.96% |
| GPR | \$21,299,881 | \$22,077,000 | \$24,287,900 | \$24,412,900 | 116.65 | 116.65 | \$44,154,000 | \$48,700,800 | \$4,546,800 | 10.30% |
| A | \$84,500 | \$84,500 | \$84,500 | \$84,500 | 0.00 | 0.00 | \$169,000 | \$169,000 | \$0 | 0.00% |
| S | \$21,215,381 | \$21,992,500 | \$24,203,400 | \$24,328,400 | 116.65 | 116.65 | \$43,985,000 | \$48,531,800 | \$4,546,800 | 10.34% |
| PR | \$6,495,657 | \$5,035,700 | \$9,742,000 | \$9,875,600 | 33.21 | 33.21 | \$10,071,400 | \$19,617,600 | \$9,546,200 | 94.79% |
| S | \$6,495,657 | \$5,035,700 | \$9,742,000 | \$9,875,600 | 33.21 | 33.21 | \$10,071,400 | \$19,617,600 | \$9,546,200 | 94.79% |
| SEG | \$3,847,707 | \$4,203,500 | \$5,728,000 | \$6,721,500 | 32.84 | 32.84 | \$8,407,000 | \$12,449,500 | \$4,042,500 | 48.08% |
| S | \$3,847,707 | \$4,203,500 | \$5,728,000 | \$6,721,500 | 32.84 | 32.84 | \$8,407,000 | \$12,449,500 | \$4,042,500 | 48.08% |
| TOTAL 01 | \$31,643,245 | \$31,316,200 | \$39,757,900 | \$41,010,000 | 182.70 | 182.70 | \$62,632,400 | \$80,767,900 | \$18,135,500 | 28.96% |
| A | \$84,500 | \$84,500 | \$84,500 | \$84,500 | 0.00 | 0.00 | \$169,000 | \$169,000 | \$0 | 0.00% |
| S | \$31,558,745 | \$31,231,700 | \$39,673,400 | \$40,925,500 | 182.70 | 182.70 | \$62,463,400 | \$80,598,900 | \$18,135,500 | 29.03% |
| AGENCY TOTAL | \$31,643,245 | \$31,316,200 | \$39,757,900 | \$41,010,000 | 182.70 | 182.70 | \$62,632,400 | \$80,767,900 | \$18,135,500 | 28.96% |

Agency Total by Decision Item

Historical Society

2325 Biennial Budget

| Decision Item | 1st Year Total | 2nd Year Total | 1st Year FTE | 2nd Year FTE |
|---|---------------------|---------------------|---------------|---------------|
| 2000 Adjusted Base Funding Level | \$31,316,200 | \$31,316,200 | 177.70 | 177.70 |
| 3001 Turnover Reduction | (\$231,500) | (\$231,500) | 0.00 | 0.00 |
| 3003 Full Funding of Continuing Position Salaries and Fringe Benefits | \$430,600 | \$430,600 | 0.00 | 0.00 |
| 3007 Overtime | \$7,300 | \$7,300 | 0.00 | 0.00 |
| 3008 Night and Weekend Differential Pay | \$12,400 | \$12,400 | 0.00 | 0.00 |
| 3011 Minor Transfers Within the Same Alpha Appropriation | \$0 | \$0 | 0.00 | 0.00 |
| 4001 Information Technology Services | \$2,048,700 | \$2,223,700 | 4.00 | 4.00 |
| 4002 Wisconsin History Center | \$1,450,000 | \$1,450,000 | 0.00 | 0.00 |
| 4003 Enterprise Risk Management Program | \$250,000 | \$200,000 | 0.00 | 0.00 |
| 4004 Records Management | \$0 | \$0 | 1.00 | 1.00 |
| 4005 Reestimates of Revenue for Continuing Appropriations | \$4,474,200 | \$5,601,300 | 0.00 | 0.00 |
| TOTAL | \$39,757,900 | \$41,010,000 | 182.70 | 182.70 |

Program Revenue

2325 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 | \$236,451 | \$241,666 | \$95,468 | \$85,026 |
| Program Revenue | \$274,961 | \$269,000 | \$282,700 | \$282,700 |
| Total Revenue | \$511,412 | \$510,666 | \$378,168 | \$367,726 |
| Expenditures | \$269,746 | \$415,198 | \$0 | \$0 |
| 2000 Adjusted Base Funding Level | \$0 | \$0 | \$273,100 | \$273,100 |
| 3003 Full Funding of Continuing Position Salaries and Fringe Benefits | \$0 | \$0 | \$9,600 | \$9,600 |
| Compensation Reserve | \$0 | \$0 | \$2,500 | \$7,500 |
| Health Insurance Reserves | \$0 | \$0 | \$3,158 | \$6,197 |
| Wisconsin Retirement System | \$0 | \$0 | \$17 | \$33 |
| 27th Pay Period Reserve (FY24 only) | \$0 | \$0 | \$4,767 | \$0 |
| Total Expenditures | \$269,746 | \$415,198 | \$293,142 | \$296,430 |
| Closing Balance | \$241,666 | \$95,468 | \$85,026 | \$71,296 |

Program Revenue

2325 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 | \$8,682 | \$8,437 | \$9,187 | \$9,187 |
| Program Revenue | \$111,135 | \$127,418 | \$130,000 | \$150,000 |
| Prior Year A/R | \$0 | \$750 | \$0 | \$0 |
| Total Revenue | \$119,817 | \$136,605 | \$139,187 | \$159,187 |
| Expenditures | \$111,379 | \$127,418 | \$0 | \$0 |
| 4005 Reestimates of Revenue for Continuing Appropriations | \$0 | \$0 | \$30,000 | \$50,000 |
| 2000 Adjusted Base Funding Level | \$0 | \$0 | \$100,000 | \$100,000 |
| Total Expenditures | \$111,379 | \$127,418 | \$130,000 | \$150,000 |
| Closing Balance | \$8,438 | \$9,187 | \$9,187 | \$9,187 |

Program Revenue

2325 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 | (\$367,542) | (\$452,351) | \$251,701 | \$145,080 |
| Program Revenue | \$1,174,221 | \$2,271,199 | \$2,500,000 | \$2,500,000 |
| Prior Year A/R | \$0 | \$723,051 | \$0 | \$0 |
| Total Revenue | \$806,679 | \$2,541,899 | \$2,751,701 | \$2,645,080 |
| Expenditures | \$1,259,030 | \$2,290,198 | \$0 | \$0 |
| 2000 Adjusted Base Funding Level | \$0 | \$0 | \$936,800 | \$936,800 |
| 3003 Full Funding of Continuing Position Salaries and Fringe Benefits | \$0 | \$0 | (\$349,600) | (\$349,600) |
| Compensation Reserve | \$0 | \$0 | \$5,900 | \$17,900 |
| Health Insurance Reserves | \$0 | \$0 | \$2,123 | \$4,166 |
| Wisconsin Retirement System | \$0 | \$0 | \$28 | \$56 |
| 27th Pay Period Reserve (FY24 only) | \$0 | \$0 | \$11,370 | \$0 |
| 4005 Reestimates of Revenue for Continuing Appropriations | \$0 | \$0 | \$2,000,000 | \$2,000,000 |
| Total Expenditures | \$1,259,030 | \$2,290,198 | \$2,606,621 | \$2,609,322 |
| Closing Balance | (\$452,351) | \$251,701 | \$145,080 | \$35,758 |

Program Revenue

2325 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 |
| Program Revenue | \$0 | \$0 | \$9,800 | \$9,800 |
| Total Revenue | \$0 | \$0 | \$9,800 | \$9,800 |
| Expenditures | \$0 | \$0 | \$0 | \$0 |
| 2000 Adjusted Base Funding Level | \$0 | \$0 | \$9,800 | \$9,800 |
| Total Expenditures | \$0 | \$0 | \$9,800 | \$9,800 |
| Closing Balance | \$0 | \$0 | \$0 | \$0 |

Program Revenue

2325 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 | \$235,300 | \$229,800 | \$236,800 | \$236,800 |
| Total Revenue | \$235,300 | \$229,800 | \$236,800 | \$236,800 |
| Expenditures | \$235,300 | \$229,800 | \$0 | \$0 |
| 2000 Adjusted Base Funding Level | \$0 | \$0 | \$236,300 | \$236,300 |
| 3003 Full Funding of Continuing Position Salaries and Fringe Benefits | \$0 | \$0 | \$500 | \$500 |
| Compensation Reserve | \$0 | \$0 | \$3,400 | \$10,400 |
| Health Insurance Reserves | \$0 | \$0 | \$3,384 | \$6,640 |
| Wisconsin Retirement System | \$0 | \$0 | \$19 | \$38 |
| 27th Pay Period Reserve (FY24 only) | \$0 | \$0 | \$6,562 | \$0 |
| Expenditure Reduction | \$0 | \$0 | (\$13,365) | (\$17,078) |
| Total Expenditures | \$235,300 | \$229,800 | \$236,800 | \$236,800 |
| Closing Balance | \$0 | \$0 | \$0 | \$0 |

Program Revenue

2325 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 | \$263,626 | \$180,361 | \$262,914 | \$207,989 |
| Program Revenue | \$2,821,078 | \$2,110,066 | \$2,100,000 | \$2,100,000 |
| Prior Year A/R | \$0 | \$82,553 | \$0 | \$0 |
| Total Revenue | \$3,084,704 | \$2,372,980 | \$2,362,914 | \$2,307,989 |
| Expenditures | \$2,904,343 | \$2,110,066 | \$0 | \$0 |
| 2000 Adjusted Base Funding Level | \$0 | \$0 | \$1,727,000 | \$1,727,000 |
| 3003 Full Funding of Continuing Position Salaries and Fringe Benefits | \$0 | \$0 | \$7,500 | \$7,500 |
| Compensation Reserve | \$0 | \$0 | \$15,200 | \$46,100 |
| Health Insurance Reserves | \$0 | \$0 | \$10,422 | \$20,449 |
| Wisconsin Retirement System | \$0 | \$0 | \$81 | \$162 |
| 27th Pay Period Reserve (FY24 only) | \$0 | \$0 | \$29,222 | \$0 |
| 4005 Reestimates of Revenue for Continuing Appropriations | \$0 | \$0 | \$365,500 | \$365,500 |
| Total Expenditures | \$2,904,343 | \$2,110,066 | \$2,154,925 | \$2,166,711 |
| Closing Balance | \$180,361 | \$262,914 | \$207,989 | \$141,278 |

Program Revenue

2325 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 | \$0 | \$75,000 | \$0 | \$0 |
| Program Revenue | \$265,600 | \$265,600 | \$1,791,600 | \$1,791,600 |
| Total Revenue | \$265,600 | \$340,600 | \$1,791,600 | \$1,791,600 |
| Expenditures | \$190,600 | \$340,600 | \$0 | \$0 |
| Expenditure Reduction | \$0 | \$0 | (\$9,459) | (\$10,466) |
| 4002 Wisconsin History Center | \$0 | \$0 | \$1,450,000 | \$1,450,000 |
| 2000 Adjusted Base Funding Level | \$0 | \$0 | \$268,800 | \$268,800 |
| 3003 Full Funding of Continuing Position Salaries and Fringe Benefits | \$0 | \$0 | \$72,800 | \$72,800 |
| Compensation Reserve | \$0 | \$0 | \$3,000 | \$9,100 |
| Health Insurance Reserves | \$0 | \$0 | \$690 | \$1,354 |
| Wisconsin Retirement System | \$0 | \$0 | \$6 | \$12 |
| 27th Pay Period Reserve (FY24 only) | \$0 | \$0 | \$5,763 | \$0 |
| Total Expenditures | \$190,600 | \$340,600 | \$1,791,600 | \$1,791,600 |
| Closing Balance | \$75,000 | \$0 | \$0 | \$0 |

Segregated Funds Revenue and Balances Statement

2325 Biennial Budget

| | CODES | TITLES |
|------------------------------|-------|----------------------------|
| DEPARTMENT | 245 | Historical Society |
| PROGRAM | 01 | History services |
| SUBPROGRAM | | |
| NUMERIC APPROPRIATION | 61 | General program operations |
| STATUTORY FUND | 760 | HISTORICAL SOCIETY TRUST |

| Revenue and Expenditures | Prior Year Actuals | Base Year Estimate | 1st Year Estimate | 2nd Year Estimate |
|---|---------------------|---------------------|---------------------|---------------------|
| Opening Balance | \$24,838,719 | \$21,370,039 | \$20,514,154 | \$20,788,124 |
| Endowment Gains / Losses | (\$2,866,673) | \$0 | \$1,000,000 | \$1,000,000 |
| Prior Year A/R | \$0 | \$82,193 | \$0 | \$0 |
| Total Revenue | \$21,972,046 | \$21,452,232 | \$21,514,154 | \$21,788,124 |
| Expenditures | \$602,007 | \$938,078 | \$0 | \$0 |
| 2000 Adjusted Base Funding Level | \$0 | \$0 | \$651,600 | \$651,600 |
| 3003 Full Funding of Continuing Position Salaries and Fringe Benefits | \$0 | \$0 | (\$28,900) | (\$28,900) |
| Compensation Reserve | \$0 | \$0 | \$5,900 | \$17,900 |
| Health Insurance Reserves | \$0 | \$0 | \$6,075 | \$11,920 |
| Wisconsin Retirement System | \$0 | \$0 | \$21 | \$41 |
| 27th Pay Period Reserve (FY24 only) | \$0 | \$0 | \$11,334 | \$0 |
| 4005 Reestimates of Revenue for Continuing Appropriations | \$0 | \$0 | \$104,000 | \$147,500 |
| Total Expenditures | \$602,007 | \$938,078 | \$750,030 | \$800,061 |
| Closing Balance | \$21,370,039 | \$20,514,154 | \$20,764,124 | \$20,988,063 |

Segregated Funds Revenue and Balances Statement

2325 Biennial Budget

| | CODES | TITLES |
|------------------------------|-------|---|
| DEPARTMENT | 245 | Historical Society |
| PROGRAM | 01 | History services |
| SUBPROGRAM | | |
| NUMERIC APPROPRIATION | 63 | History preservation partnership trust fund |
| STATUTORY FUND | 266 | HISTORY PRESERVATION PARTNERSHIP TRUST |

| Revenue and Expenditures | Prior Year Actuals | Base Year Estimate | 1st Year Estimate | 2nd Year Estimate |
|---|--------------------|--------------------|--------------------|--------------------|
| Opening Balance | \$2,051,262 | \$2,459,692 | \$526,253 | \$999,483 |
| Earned Revenue | \$3,582,030 | \$4,905,056 | \$5,500,000 | \$6,000,000 |
| Prior Year A/R | \$0 | \$60,971 | \$0 | \$0 |
| Total Revenue | \$5,633,292 | \$7,425,719 | \$6,026,253 | \$6,999,483 |
| Expenditures | \$3,173,600 | \$6,899,466 | \$0 | \$0 |
| 4005 Reestimates of Revenue for Continuing Appropriations | \$0 | \$0 | \$825,000 | \$1,775,000 |
| 2000 Adjusted Base Funding Level | \$0 | \$0 | \$3,478,800 | \$3,478,800 |
| 3003 Full Funding of Continuing Position Salaries and Fringe Benefits | \$0 | \$0 | \$614,800 | \$614,800 |
| Compensation Reserve | \$0 | \$0 | \$30,700 | \$93,400 |
| Health Insurance Reserves | \$0 | \$0 | \$18,140 | \$35,591 |
| Wisconsin Retirement System | \$0 | \$0 | \$139 | \$279 |
| 27th Pay Period Reserve (FY24 only) | \$0 | \$0 | \$59,191 | \$0 |
| Total Expenditures | \$3,173,600 | \$6,899,466 | \$5,026,770 | \$5,997,870 |
| Closing Balance | \$2,459,692 | \$526,253 | \$999,483 | \$1,001,613 |

Segregated Funds Revenue and Balances Statement

2325 Biennial Budget

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

| Revenue and Expenditures | Prior Year Actuals | Base Year Estimate | 1st Year Estimate | 2nd Year Estimate |
|---|--------------------|--------------------|-------------------|-------------------|
| Opening Balance | \$0 | \$0 | \$0 | \$0 |
| Conservation Funds | \$72,100 | \$71,300 | \$82,700 | \$82,700 |
| Total Revenue | \$72,100 | \$71,300 | \$82,700 | \$82,700 |
| Expenditures | \$72,100 | \$71,300 | \$0 | \$0 |
| 2000 Adjusted Base Funding Level | \$0 | \$0 | \$73,100 | \$73,100 |
| 3003 Full Funding of Continuing Position Salaries and Fringe Benefits | \$0 | \$0 | \$9,600 | \$9,600 |
| Compensation Reserve | \$0 | \$0 | \$1,000 | \$3,200 |
| Health Insurance Reserves | \$0 | \$0 | \$1,864 | \$3,658 |
| Wisconsin Retirement System | \$0 | \$0 | \$6 | \$12 |
| 27th Pay Period Reserve (FY24 only) | \$0 | \$0 | \$2,008 | \$0 |
| Expenditure Reduction | \$0 | \$0 | (\$4,878) | (\$6,870) |
| Total Expenditures | \$72,100 | \$71,300 | \$82,700 | \$82,700 |
| Closing Balance | \$0 | \$0 | \$0 | \$0 |

Decision Item (DIN) - 2000

Decision Item (DIN) Title - Adjusted Base Funding Level

NARRATIVE

Adjusted Base Funding Level

Decision Item by Line

2325 Biennial Budget

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

| | Expenditure Items | 1st Year Cost | 2nd Year Cost |
|-----------|-------------------------------------|----------------------|----------------------|
| 01 | Permanent Position Salaries | \$10,739,500 | \$10,739,500 |
| 02 | Turnover | \$0 | \$0 |
| 03 | Project Position Salaries | \$12,300 | \$12,300 |
| 04 | LTE/Misc. Salaries | \$911,600 | \$911,600 |
| 05 | Fringe Benefits | \$5,517,100 | \$5,517,100 |
| 06 | Supplies and Services | \$9,427,900 | \$9,427,900 |
| 07 | Permanent Property | \$0 | \$0 |
| 08 | Unallotted 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 | \$4,623,300 | \$4,623,300 |
| 13 | Special Purpose | \$0 | \$0 |
| 14 | | \$0 | \$0 |
| 15 | | \$0 | \$0 |
| 16 | | \$0 | \$0 |
| 17 | TOTAL | \$31,316,200 | \$31,316,200 |
| 18 | Project Positions Authorized | 0.00 | 0.00 |
| 19 | Classified Positions Authorized | 170.70 | 170.70 |
| 20 | Unclassified Positions Authorized | 7.00 | 7.00 |

Decision Item by Numeric

2325 Biennial Budget

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 | \$16,566,900 | \$16,566,900 | 112.65 | 112.65 |
| | 03 Wisconsin black historical society and museum | \$84,500 | \$84,500 | 0.00 | 0.00 |
| | 05 Energy costs; energy-related assessments | \$812,100 | \$812,100 | 0.00 | 0.00 |
| | 06 Principal repayment, interest, and rebates | \$4,613,500 | \$4,613,500 | 0.00 | 0.00 |
| | 20 Records management--service funds | \$273,100 | \$273,100 | 2.00 | 2.00 |
| | 27 General Donations | \$100,000 | \$100,000 | 0.00 | 0.00 |
| | 32 Foundation Contributed Income | \$936,800 | \$936,800 | 5.60 | 5.60 |
| | 34 Self-amortizing facilities; principal repayment; interest and rebates | \$9,800 | \$9,800 | 0.00 | 0.00 |
| | 36 Northern Great Lakes center | \$236,300 | \$236,300 | 2.75 | 2.75 |
| | 37 General program operations, service funds | \$1,727,000 | \$1,727,000 | 11.00 | 11.00 |
| | 38 Storage facility | \$268,800 | \$268,800 | 2.00 | 2.00 |
| | 41 General program operations, federal funds | \$1,366,400 | \$1,366,400 | 8.66 | 8.66 |
| | 45 Indirect cost reimbursements | \$117,500 | \$117,500 | 0.20 | 0.20 |

Decision Item by Numeric

2325 Biennial Budget

Historical Society

| | | | | | |
|--|--|---------------------|---------------------|---------------|---------------|
| | 61 General program operations | \$651,600 | \$651,600 | 5.25 | 5.25 |
| | 63 History preservation partnership trust fund | \$3,478,800 | \$3,478,800 | 26.59 | 26.59 |
| | 64 Northern Great Lakes center; interpretive programming | \$73,100 | \$73,100 | 1.00 | 1.00 |
| | History services Sub Total | \$31,316,200 | \$31,316,200 | 177.70 | 177.70 |
| | Adjusted Base Funding Level Sub Total | \$31,316,200 | \$31,316,200 | 177.70 | 177.70 |
| | | | | | |
| | Agency Total | \$31,316,200 | \$31,316,200 | 177.70 | 177.70 |

Decision Item by Fund Source

2325 Biennial Budget

Historical Society

| Decision Item/Source of Funds | | 1st Year Total | 2nd Year Total | 1st Year FTE | 2nd Year FTE |
|--|---|---------------------|---------------------|---------------|---------------|
| 2000 Adjusted Base Funding Level | | | | | |
| GPR | A | \$84,500 | \$84,500 | 0.00 | 0.00 |
| GPR | S | \$21,992,500 | \$21,992,500 | 112.65 | 112.65 |
| PR | S | \$3,551,800 | \$3,551,800 | 23.35 | 23.35 |
| PR Federal | S | \$1,483,900 | \$1,483,900 | 8.86 | 8.86 |
| SEG | S | \$4,203,500 | \$4,203,500 | 32.84 | 32.84 |
| Adjusted Base Funding Level Total | | \$31,316,200 | \$31,316,200 | 177.70 | 177.70 |
| | | | | | |
| Agency Total | | \$31,316,200 | \$31,316,200 | 177.70 | 177.70 |

Decision Item (DIN) - 3001

Decision Item (DIN) Title - Turnover Reduction

NARRATIVE

Standard Budget Adjustment - Turnover Reduction

Decision Item by Line

2325 Biennial Budget

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

| | Expenditure Items | 1st Year Cost | 2nd Year Cost |
|-----------|-------------------------------------|----------------------|----------------------|
| 01 | Permanent Position Salaries | \$0 | \$0 |
| 02 | Turnover | (\$231,500) | (\$231,500) |
| 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 | Unallotted 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 | (\$231,500) | (\$231,500) |
| 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

2325 Biennial Budget

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 | (\$231,500) | (\$231,500) | 0.00 | 0.00 |
| | History services Sub Total | (\$231,500) | (\$231,500) | 0.00 | 0.00 |
| | Turnover Reduction Sub Total | (\$231,500) | (\$231,500) | 0.00 | 0.00 |
| | | | | | |
| | Agency Total | (\$231,500) | (\$231,500) | 0.00 | 0.00 |

Decision Item by Fund Source

2325 Biennial Budget

Historical Society

| Decision Item/Source of Funds | | 1st Year Total | 2nd Year Total | 1st Year FTE | 2nd Year FTE |
|---------------------------------|---|--------------------|--------------------|--------------|--------------|
| 3001 Turnover Reduction | | | | | |
| GPR | S | (\$231,500) | (\$231,500) | 0.00 | 0.00 |
| Turnover Reduction Total | | (\$231,500) | (\$231,500) | 0.00 | 0.00 |
| | | | | | |
| Agency Total | | (\$231,500) | (\$231,500) | 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

2325 Biennial Budget

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

| | Expenditure Items | 1st Year Cost | 2nd Year Cost |
|-----------|-------------------------------------|----------------------|----------------------|
| 01 | Permanent Position Salaries | \$820,400 | \$820,400 |
| 02 | Turnover | \$0 | \$0 |
| 03 | Project Position Salaries | \$0 | \$0 |
| 04 | LTE/Misc. Salaries | \$0 | \$0 |
| 05 | Fringe Benefits | (\$389,800) | (\$389,800) |
| 06 | Supplies and Services | \$0 | \$0 |
| 07 | Permanent Property | \$0 | \$0 |
| 08 | Unallotted 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 | \$430,600 | \$430,600 |
| 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

2325 Biennial Budget

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 | \$124,000 | \$124,000 | 0.00 | 0.00 |
| | 20 Records management--service funds | \$9,600 | \$9,600 | 0.00 | 0.00 |
| | 32 Foundation Contributed Income | (\$349,600) | (\$349,600) | 0.00 | 0.00 |
| | 36 Northern Great Lakes center | \$500 | \$500 | 0.00 | 0.00 |
| | 37 General program operations, service funds | \$7,500 | \$7,500 | 0.00 | 0.00 |
| | 38 Storage facility | \$72,800 | \$72,800 | 0.00 | 0.00 |
| | 41 General program operations, federal funds | (\$34,400) | (\$34,400) | 0.00 | 0.00 |
| | 45 Indirect cost reimbursements | \$4,700 | \$4,700 | 0.00 | 0.00 |
| | 61 General program operations | (\$28,900) | (\$28,900) | 0.00 | 0.00 |
| | 63 History preservation partnership trust fund | \$614,800 | \$614,800 | 0.00 | 0.00 |
| | 64 Northern Great Lakes center; interpretive programming | \$9,600 | \$9,600 | 0.00 | 0.00 |
| | History services Sub Total | \$430,600 | \$430,600 | 0.00 | 0.00 |
| | Full Funding of Continuing Position Salaries and Fringe Benefits Sub Total | \$430,600 | \$430,600 | 0.00 | 0.00 |

Decision Item by Numeric

2325 Biennial Budget

Historical Society

| | | | | | |
|--|---------------------|------------------|------------------|-------------|-------------|
| | | | | | |
| | Agency Total | \$430,600 | \$430,600 | 0.00 | 0.00 |

Decision Item by Fund Source

2325 Biennial Budget

Historical Society

| Decision Item/Source of Funds | | 1st Year Total | 2nd Year Total | 1st Year FTE | 2nd Year FTE |
|---|---|------------------|------------------|--------------|--------------|
| 3003 Full Funding of Continuing Position Salaries and Fringe Benefits | | | | | |
| GPR | S | \$124,000 | \$124,000 | 0.00 | 0.00 |
| PR | S | (\$259,200) | (\$259,200) | 0.00 | 0.00 |
| PR Federal | S | (\$29,700) | (\$29,700) | 0.00 | 0.00 |
| SEG | S | \$595,500 | \$595,500 | 0.00 | 0.00 |
| Full Funding of Continuing Position Salaries and Fringe Benefits Total | | \$430,600 | \$430,600 | 0.00 | 0.00 |
| | | | | | |
| Agency Total | | \$430,600 | \$430,600 | 0.00 | 0.00 |

Decision Item (DIN) - 3007

Decision Item (DIN) Title - Overtime

NARRATIVE

Standard Budget Adjustment - Overtime

Decision Item by Line

2325 Biennial Budget

| | | |
|----------------------|--------------|--------------------|
| DEPARTMENT | CODES | TITLES |
| | 245 | Historical Society |
| DECISION ITEM | CODES | TITLES |
| | 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 | Unallotted 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 | \$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

2325 Biennial Budget

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 Sub Total | \$7,300 | \$7,300 | 0.00 | 0.00 |
| | Overtime Sub Total | \$7,300 | \$7,300 | 0.00 | 0.00 |
| | | | | | |
| | Agency Total | \$7,300 | \$7,300 | 0.00 | 0.00 |

Decision Item by Fund Source

2325 Biennial Budget

Historical Society

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

2325 Biennial Budget

| | | |
|----------------------|--------------|------------------------------------|
| DEPARTMENT | CODES | TITLES |
| | 245 | Historical Society |
| DECISION ITEM | CODES | TITLES |
| | 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 | \$1,700 | \$1,700 |
| 06 | Supplies and Services | \$0 | \$0 |
| 07 | Permanent Property | \$0 | \$0 |
| 08 | Unallotted 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 | \$12,400 | \$12,400 |
| 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

2325 Biennial Budget

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 | \$12,400 | \$12,400 | 0.00 | 0.00 |
| | History services Sub Total | \$12,400 | \$12,400 | 0.00 | 0.00 |
| | Night and Weekend Differential Pay Sub Total | \$12,400 | \$12,400 | 0.00 | 0.00 |
| | | | | | |
| | Agency Total | \$12,400 | \$12,400 | 0.00 | 0.00 |

Decision Item by Fund Source

2325 Biennial Budget

Historical Society

| Decision Item/Source of Funds | | 1st Year Total | 2nd Year Total | 1st Year FTE | 2nd Year FTE |
|---|---|-----------------|-----------------|--------------|--------------|
| 3008 Night and Weekend Differential Pay | | | | | |
| GPR | S | \$12,400 | \$12,400 | 0.00 | 0.00 |
| Night and Weekend Differential Pay Total | | \$12,400 | \$12,400 | 0.00 | 0.00 |
| | | | | | |
| Agency Total | | \$12,400 | \$12,400 | 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

2325 Biennial Budget

| | | |
|----------------------|--------------|---|
| DEPARTMENT | CODES | TITLES |
| | 245 | Historical Society |
| DECISION ITEM | CODES | TITLES |
| | 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 | \$355,900 | \$355,900 |
| 05 | Fringe Benefits | \$93,900 | \$93,900 |
| 06 | Supplies and Services | (\$449,800) | (\$449,800) |
| 07 | Permanent Property | \$0 | \$0 |
| 08 | Unallotted 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 | \$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

2325 Biennial Budget

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 | | | | |
| | 01 General program operations | \$0 | \$0 | 0.00 | 0.00 |
| | History services Sub Total | \$0 | \$0 | 0.00 | 0.00 |
| | Minor Transfers Within the Same Alpha Appropriation Sub Total | \$0 | \$0 | 0.00 | 0.00 |
| | | | | | |
| | Agency Total | \$0 | \$0 | 0.00 | 0.00 |

Decision Item by Fund Source

2325 Biennial Budget

Historical Society

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

Decision Item (DIN) - 4001

Decision Item (DIN) Title - Information Technology Services

NARRATIVE

See Budget Paper for details.



WISCONSIN
HISTORICAL
SOCIETY

2023-2025 Biennial Budget

DIN 4001: Information Technology Services

The Wisconsin Historical Society (“WHS” or the “Society”) requests \$2,048,700 GPR 101 and 4.0 GPR 101-funded FTE in FY2024 and \$2,223,700 annually starting in FY2025 for Information Technology Services due to notification from the University of Wisconsin-Madison (“UW” or “UW-Madison”), Division of Information Technology (“DoIT”) that they are no longer able to continue IT support for the Society after December 31, 2022, due to contractual compliance disparities.

This is a critical request. Adequate funding and staffing resources are required for the stability of the WHS IT Services Program to allow WHS to meet its statutory responsibilities, public mission, and strategic initiatives. The IT program provides essential services to existing programs and historic sites located throughout the state. Further, to scale up digital operations in support of the new History Center, additional resources are critical to achieve and sustain both.

In 2015-16, WHS worked with both DoIT and the Department of Administration’s Division of Enterprise Technology (“DET”) to determine that WHS would not participate in the DET Consolidation Project, but rather integrate further into the DoIT environment due to WHS’ unique relationship with UW-Madison. As a result of this decision, the IT support and services model for WHS shifted significantly to capitalize on service enhancements and cost-efficiencies, estimated, *at that time*, to be more than \$2 million in one-time charges and approximately \$800,000 annually. This transition, though financially responsible, created a greater dependency on DoIT services and staff support. Between 2016 and 2021, the partnership between WHS and DoIT grew to include key IT systems such as file hosting, security, server and database hosting and administration, email and M365 applications, VoIP service, endpoint management, network management, and other IT services.

In January 2021, DoIT froze new services and software licenses for the Society indicating that rates and accounting practices needed to be adjusted, several assurances were made over the rest of the year that UW intended to fix issues and continue providing service. Sixteen months later, on April 15, 2022, DoIT directed core services to be deprovisioned by the end of 2022.

In June 2022 and July 2022, WHS engaged with DET to discuss the process and requirements to transition to their services and worked to understand how best to transition IT services with the least amount of impact to WHS operations. DOA IT and cybersecurity advisors advocated that, even though some services could still be provided by DoIT, it would create unnecessary complexity for WHS staff and allow greater opportunity for risk to WHS business and program operations. Therefore, the decision was made to be comprehensive in our approach to the transition from DoIT to DET.

This request includes funding and position authority to ensure the WHS IT Program can maintain the current level of services and support to its employees, the public, and stakeholders; provide access to schools, students, and researchers around the state; initiate and implement planned strategic agency IT initiatives as described in our IT Strategic Plan, including equipment for the Digital Infrastructure Modernization Project (“DIMP”); support the development, construction, and implementation of the new Wisconsin History Center, a \$70M state tax-payer investment; participate in Statewide IT initiatives, such as VoIP, with other state agencies, which are critical to operations; and appropriately plan for increases in costs due to technology industry norms related to licensing and technological innovations.

A breakdown of anticipated \$2,048,700 Supplies and Services charges by category are listed below:

- Infrastructure and Network – \$363,548 (annually)
- Software, Licensing, and Cloud Solutions – \$219,270(annually)
- Security and Support Operations – \$298,182 (annually)
- Contractor Resources – \$969,280 (annually)
- Large Format Scanner – \$110,000 (one-time DIMP equipment)
- DET Consulting – \$8,300 (one-time)

In addition to the Supplies and Services funding required, this request includes position authority and funding for 4 FTE positions that are necessary to support daily IT operations and to implement digitization initiatives included in the WHS IT Strategic Plan. This includes a Security and Operations Supervisor who provides management and administration of the cyber security and IT support activities agency-wide; a Data Specialist that will implement and support data and metadata strategies associated with digital initiatives and projects; a Digital Program Area Specialist to consult, plan, and implement digitization projects; and a Digital Program Assistant who provides technical support for digitization projects.

The financial impact of this transition is based on several key factors, including:

- Inadequate notice by UW-Madison prevented the WHS from engaging in a strategic approach to transitioning services and completing a comprehensive review of potential options for cost-benefit assessment.
- The cost structure for key services (e.g., server hosting, file hosting) is 50-70% more with DET than DoIT.
- Significant increase in costs for IT systems and software, such as Microsoft 365 and Adobe, as WHS can no longer leverage educational or favorable pricing through UW contracts.
- DET does not provide the same or similar services currently utilized by WHS programs and staff as enterprise services, therefore WHS must contract directly with vendors and will not realize potential savings from shared contracting.
- WHS is required to maintain its services with UW libraries for specific program areas that engage with UW programs and staff.
- WHS is required to change its IT operations and support model to support service management, staff augmentation, administration, and execution in several areas that will not be provided once transitioned to DET.

Decision Item by Line

2325 Biennial Budget

| | | |
|----------------------|--------------|---------------------------------|
| DEPARTMENT | CODES | TITLES |
| | 245 | Historical Society |
| DECISION ITEM | CODES | TITLES |
| | 4001 | Information Technology Services |

| | Expenditure Items | 1st Year Cost | 2nd Year Cost |
|-----------|-------------------------------------|----------------------|----------------------|
| 01 | Permanent Position Salaries | \$56,300 | \$262,500 |
| 02 | Turnover | \$0 | \$0 |
| 03 | Project Position Salaries | \$0 | \$0 |
| 04 | LTE/Misc. Salaries | \$0 | \$0 |
| 05 | Fringe Benefits | \$23,800 | \$110,900 |
| 06 | Supplies and Services | \$1,968,600 | \$1,850,300 |
| 07 | Permanent Property | \$0 | \$0 |
| 08 | Unallotted 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 | \$2,048,700 | \$2,223,700 |
| 18 | Project Positions Authorized | 0.00 | 0.00 |
| 19 | Classified Positions Authorized | 4.00 | 4.00 |
| 20 | Unclassified Positions Authorized | 0.00 | 0.00 |

Decision Item by Numeric

2325 Biennial Budget

Historical Society

| Program | Decision Item/Numeric | 1st Year Total | 2nd Year Total | 1st Year FTE | 2nd Year FTE |
|---------|--|--------------------|--------------------|--------------|--------------|
| | 4001 Information Technology Services | | | | |
| 01 | History services | | | | |
| | 01 General program operations | \$2,048,700 | \$2,223,700 | 4.00 | 4.00 |
| | History services Sub Total | \$2,048,700 | \$2,223,700 | 4.00 | 4.00 |
| | Information Technology Services Sub Total | \$2,048,700 | \$2,223,700 | 4.00 | 4.00 |
| | | | | | |
| | Agency Total | \$2,048,700 | \$2,223,700 | 4.00 | 4.00 |

Decision Item by Fund Source

2325 Biennial Budget

Historical Society

| Decision Item/Source of Funds | | 1st Year Total | 2nd Year Total | 1st Year FTE | 2nd Year FTE |
|--|---|--------------------|--------------------|--------------|--------------|
| 4001 Information Technology Services | | | | | |
| GPR | S | \$2,048,700 | \$2,223,700 | 4.00 | 4.00 |
| Information Technology Services Total | | \$2,048,700 | \$2,223,700 | 4.00 | 4.00 |
| | | | | | |
| Agency Total | | \$2,048,700 | \$2,223,700 | 4.00 | 4.00 |

Decision Item (DIN) - 4002

Decision Item (DIN) Title - Wisconsin History Center

NARRATIVE

See Budget Paper for details.



WISCONSIN
HISTORICAL
SOCIETY

2023-2025 Biennial Budget

DIN 4002: Wisconsin History Center

The Wisconsin Historical Society (“WHS” or the “Society”) requests \$1.45 million PRS 138 (Tribal Gaming funds) annually starting in FY2024 to support collections preservation, conservation, and preparation as well as the digital infrastructure required for the new Wisconsin History Center (the “History Center” or “Center”), and eventually operations of the Center in the future biennium.

The History Center will be a world class 21st century history museum, education, and program experience on the Capitol Square in Madison. This enumerated state project is on track to open in FY2027 and expected to serve 250,000 visitors annually. A project of this scale requires a significant investment in planning and preparation.

The Society’s collection holdings include over 150,000 cubic feet of archival collections, 25,000 maps and atlases, 3 million photographs, and 750,000 three-dimensional artifacts and archaeological items, including American Indian collections. From these holdings the Society will select approximately 6,300 items for display in the 35,000 square feet of exhibition space in the new Center. In addition, approximately 18,000 items will be vetted and digitized for inclusion in films, media productions, audio recordings, and other immersive experiences within the Center as well as future changing exhibitions.

A priority throughout the Center is to integrate responsible, culturally sensitive collections stewardship and management practices, which reflect an understanding of the experiences of tribal members and Tribal Nations. The Society and its newly hired Curator of American Indian Collections are engaging tribal members and tribal museum professionals in consultation to determine the best way to steward these collections and share the stories of the Tribal Nations. These consultations involve the Society’s archaeological collections and American Indian collections to ensure the selection of items is appropriate and the description of items in the Center is accurate.

In the 2023-25 biennium, the Society will utilize the requested funding for subject matter professionals to assess, clean, and perform a range of conservation activities on 6,300 objects. This work will be done in consultation with the Society’s collections preservation staff, the Curator of American Indian Collections, and Tribal Nations. The funding will also support contractors to prepare collection items for transportation to the new Center and long-term exhibition. And finally, the Society will engage consultants with expertise in digital collections and audio-visual material will to prepare collection items for immersive media experiences in the Center, and establish the digital infrastructure to preserve and access the Society’s collections. These activities will not only be critical to the guest experience at the Center, but will also allow these treasures to be accessible online to the world for the long term. Activities herein include photography, 3D scanning, digitization, captioning and transcription of audio-visual recordings, audio description and enhancement, translation, accessibility audits, and digital preservation. For American Indian collection items, engagement of tribal members and consultation with Tribal Nations

will be required to ensure the Society's item description, labels, and records are updated to reflect traditional descriptions and knowledge from those Nations.

This work will take the full two years of the biennium and is categorized as follows:

- Object conservation: \$1.9 million (one-time over two years)
- Object preparation and transport: \$300,000 (one-time over two years)
- Exhibit preparation and digital infrastructure: \$700,000 (one-time over two years)

Although this first phase of work requires only one-time expenditures, the Society is requesting this funding on an ongoing, biennial basis. In the 2025-27 biennium, the funding will be used to ramp up essential staff functions, install exhibits and the 6,300 objects, train employees, and open and operate the Center. WHS does not intend to request additional new funding for the Center, but will likely request position authority and would reallocate this funding to support positions as well as essential functions of the Center, such as security, janitorial services, and maintenance.



WISCONSIN
HISTORICAL
SOCIETY

2023-2025 Biennial Budget

**DIN 4002: Wisconsin History Center
Statutory Language Change**

The Wisconsin Historical Society (the “Society”) proposes creating a new alpha appropriation in Wis. Stats. § 20.245(1) for the funding requested and purpose defined in DIN 4002: Wisconsin History Center. This would be a similar approach and process utilized for the existing appropriation for the State Archive Preservation Facility (i.e. Storage Facility) found in Wis. Stat. § 20.245(k): [https://docs.legis.wisconsin.gov/document/statutes/20.245\(1\)\(k\)](https://docs.legis.wisconsin.gov/document/statutes/20.245(1)(k)).

The Society recommends the following statutory language be added to the Wisconsin Statutes:

20.245(1)(kg) *History Center*. Biennially, the amounts in the schedule to support the planning, preparation, and operation of a history center for the historical society. All moneys transferred from the appropriation account under s. 20.505 (8) (hm) 4f. shall be credited to this appropriation account. Notwithstanding s. 20.001 (3) (b), the unencumbered balance on June 30 of each odd-numbered year shall revert to the appropriation account under s. 20.505 (8) (hm).

20.505(8)(hm)4f. The amount transferred to s. 20.245 (1) (kg) shall be the amount in the schedule under s. 20.245 (1) (kg).

Decision Item by Line

2325 Biennial Budget

| | | |
|----------------------|--------------|--------------------------|
| DEPARTMENT | CODES | TITLES |
| | 245 | Historical Society |
| DECISION ITEM | CODES | TITLES |
| | 4002 | Wisconsin History Center |

| | 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 | \$1,450,000 | \$1,450,000 |
| 07 | Permanent Property | \$0 | \$0 |
| 08 | Unallotted 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 | \$1,450,000 | \$1,450,000 |
| 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

2325 Biennial Budget

Historical Society

| Program | Decision Item/Numeric | 1st Year Total | 2nd Year Total | 1st Year FTE | 2nd Year FTE |
|---------|---|--------------------|--------------------|--------------|--------------|
| | 4002 Wisconsin History Center | | | | |
| 01 | History services | | | | |
| | 38 Storage facility | \$1,450,000 | \$1,450,000 | 0.00 | 0.00 |
| | History services Sub Total | \$1,450,000 | \$1,450,000 | 0.00 | 0.00 |
| | Wisconsin History Center Sub Total | \$1,450,000 | \$1,450,000 | 0.00 | 0.00 |
| | | | | | |
| | Agency Total | \$1,450,000 | \$1,450,000 | 0.00 | 0.00 |

Decision Item by Fund Source

2325 Biennial Budget

Historical Society

| Decision Item/Source of Funds | | 1st Year Total | 2nd Year Total | 1st Year FTE | 2nd Year FTE |
|---------------------------------------|---|--------------------|--------------------|--------------|--------------|
| 4002 Wisconsin History Center | | | | | |
| PR | S | \$1,450,000 | \$1,450,000 | 0.00 | 0.00 |
| Wisconsin History Center Total | | \$1,450,000 | \$1,450,000 | 0.00 | 0.00 |
| | | | | | |
| Agency Total | | \$1,450,000 | \$1,450,000 | 0.00 | 0.00 |

Decision Item (DIN) - 4003

Decision Item (DIN) Title - Enterprise Risk Management Program

NARRATIVE

See Budget Paper for details.



WISCONSIN
HISTORICAL
SOCIETY

2023-2025 Biennial Budget

DIN 4003: Enterprise Risk Management Program

The Wisconsin Historical Society (“WHS” or the “Society”) requests \$250,000 GPR 101 in FY2024 and \$200,000 GPR 101 annually starting in FY2025 to establish an Enterprise Risk Management (“ERM”) Program. If funded, the Society would contribute an existing FTE and reallocate existing funding to support a Risk Management Program Director to ensure success of the ERM Program.

Currently, WHS risk management activities are dispersed throughout agency sites and staff. While no major incidents have occurred, WHS recognizes the need to establish a formal and centralized risk management program, which will allow agency leadership and staff to better plan for, mitigate, and react to risks and situations consistently and effectively. As WHS, the State, and stakeholders continue to invest in new infrastructure, such as the new Wisconsin History Center and Old World Wisconsin (“OWW”) experiences; make improvements to existing facilities at the WHS Headquarters and historic sites across the state; expand its statewide historical site programming; and support existing operations, establishing a robust ERM Program will provide the Society a framework to protect those investments, our employees, and visitors. It will also allow the agency to meet its strategic objective that aims to enhance business operational readiness in support of agency initiatives and reduce financial risks.

In 2019, security assessments were performed for WHS Headquarters, Circus World Museum (“CWM”), and OWW. These assessments support the need for WHS to establish a program that will create a safer and more secure environment for our statewide facilities, collections, staff, and guests. WHS hosts a wide variety of properties, facilities, historic artifacts and collections, and dynamic historical programming throughout the state, while employing permanent, limited-term, contract, volunteer staff, and even animals. Through historic sites and museums, the Society welcomes close to 200,000 members of the public each year, on average. This diversity, while enriching our state historical presence, also creates unique risk not found in other Wisconsin state agencies.

The funding requested will support one-time and ongoing program costs, including:

- Animal Care Program development and annual monitoring (contracted services)
- Annual Employee Safety and Security Training
- Security equipment for historic sites and retail areas (one-time)
- Security for CWM and WHS headquarters (contracted services)

The Society will also relocate a GPR 101 FTE and associated funding (\$128,000 annually for salary and fringe benefit expenses) to create the WHS Risk Management Program Director position. The Director’s primary responsibilities will be to assess agency-wide needs related to safety, security, and emergency preparedness and response to create a framework and plan to address existing and future areas of risk to agency assets, employees, guests, and stakeholders. Additional

responsibilities include developing a strategic vision and framework for the ERM Program. The position will oversee the administration of a variety of complex activities aimed at protecting WHS, its officers, agents, employees, assets, and interests by identifying and managing all threats of physical, strategic, and fiscal losses. This position mitigates WHS' exposure to risk by formulating, developing, and coordinating all claims-related activities.

Below is a sample list of activities and outcomes of an ERM program:

Society-wide and site-specific programs, plans and policies

- Business continuity
- Emergency preparedness
- Health, safety, and security protocols (employees and visitors)
- Animal care
- Cash management

Facilities and Equipment

- Building repair and maintenance programs
- Communication and security systems

Employee Trainings (consistent agency-wide, appropriate frequency)

- Cybersecurity trainings
- Financial controls/processes
- De-escalation training for guest facing roles
- CPR training for key staff in each area, and in guest facing roles
- Active shooter training
- Tabletop exercises and live drills
- Facilities signage/adjustments to minimize physical injury, improve accessibility
- Emergency procedures
- Equipment training

Decision Item by Line

2325 Biennial Budget

| | | |
|----------------------|--------------|------------------------------------|
| DEPARTMENT | CODES | TITLES |
| | 245 | Historical Society |
| DECISION ITEM | CODES | TITLES |
| | 4003 | Enterprise Risk Management 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 | \$250,000 | \$200,000 |
| 07 | Permanent Property | \$0 | \$0 |
| 08 | Unallotted 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 | \$250,000 | \$200,000 |
| 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

2325 Biennial Budget

Historical Society

| Program | Decision Item/Numeric | 1st Year Total | 2nd Year Total | 1st Year FTE | 2nd Year FTE |
|---------|---|------------------|------------------|--------------|--------------|
| | 4003 Enterprise Risk Management Program | | | | |
| 01 | History services | | | | |
| | 01 General program operations | \$250,000 | \$200,000 | 0.00 | 0.00 |
| | History services Sub Total | \$250,000 | \$200,000 | 0.00 | 0.00 |
| | Enterprise Risk Management Program Sub Total | \$250,000 | \$200,000 | 0.00 | 0.00 |
| | | | | | |
| | Agency Total | \$250,000 | \$200,000 | 0.00 | 0.00 |

Decision Item by Fund Source

2325 Biennial Budget

Historical Society

| Decision Item/Source of Funds | | 1st Year Total | 2nd Year Total | 1st Year FTE | 2nd Year FTE |
|---|---|------------------|------------------|--------------|--------------|
| 4003 Enterprise Risk Management Program | | | | | |
| GPR | S | \$250,000 | \$200,000 | 0.00 | 0.00 |
| Enterprise Risk Management Program Total | | \$250,000 | \$200,000 | 0.00 | 0.00 |
| | | | | | |
| Agency Total | | \$250,000 | \$200,000 | 0.00 | 0.00 |

Decision Item (DIN) - 4004

Decision Item (DIN) Title - Records Management

NARRATIVE

See attached Budget Paper for details.



WISCONSIN
HISTORICAL
SOCIETY

2023-2025 Biennial Budget

DIN 4004: Records Management

The Wisconsin Historical Society (“WHS” or the “Society”) requests 1.0 PRS 120-funded FTE in FY2024 to support the State Records Management Program. The Society is not requesting any additional funding and will reallocate existing funds to support this FTE.

The Society houses the State Archives, a collection of state and local government created public records, which is the “ultimate depository of the archives of the state” per Wis. Stat. § 16.61 (13)(a). Per Wis. Stat. 19.21(4),(5), local government records must be offered to the WHS 60 days prior to destruction and the WHS assumes title of all state, local, and court records transferred to it per Wis. Stat. § 19.23 (1) to (4)). The State Archives is currently staffed by three FTE in the Archivist classification, two of which are focused on public records while the third is focused on electronic records. State Archives staff are responsible for the acquisition, appraisal, intake, arranging, describing, and cataloging of approximately 1000 cubic feet of public records per year (guided by Wis. Stat. § 16.61 (13)(c), Wis. Stat. § 44.02(1), and Wis. Stat. §44.02(9)). In addition, Archivists are responsible for consultation work with state government agencies and local units of government for records management questions, training, and to provide access to records housed at the Wisconsin Historical Society.

The transition from paper record creating and keeping practices to electronic records necessitates a program change. Passively accepting records at the end of the specified retention time is no longer practical, the challenges of electronic records management often mean that records are never transferred or are transferred fragmentarily upon retirement or IT request. As a consequence, records will be lost due to inattention, poor electronic records management, failure to comply with Administrative Rule 12, and simple inability to devote staff time at creating agencies.

The current public records FTE staff are subject matter experts in their respective fields – Government Records and Local Records. To more effectively use WHS resources these two positions must focus on direct work with governmental units to identify and transfer record series of interest and concern, facilitate the transfer of email records and calendars, and develop strategies (in conjunction with the electronic records archivist) to ensure the success of government records collecting. Additionally, the appraisal responsibilities of these two positions will grow because electronic records are generally not filed by series, format questions will take a priority and need untangling, and the quantities of information/data that are likely to be transferred will require thoughtful and detailed appraisal.

This request would allow the Society to hire an FTE Archivist with responsibility for accessioning (intake, arranging, describing, and cataloging) of state and local paper and digital records acquired by the existing public records Archivists. The position would build capacity for the State Archives by centralizing accessioning functions and allowing staff with specific subject matter expertise to focus on record acquisition, advice and training for government units, and implementing electronic records transfer processes. The new Archivist position would be funded by PRS appropriation 120 established by Wis.

Stat. § 20.245(1)(kw). This appropriation typically funds about 100 hours/week of LTE support for public records staff in addition to funding two FTE positions, supplies, and electronic databases used for public record preservation. The WHS will use the money typically expended on LTE staffing for the new FTE position.

Changing the staffing model from LTEs to an FTE would create efficiencies in staffing. The nature of LTE employment means there are frequent vacancies, and replacing several LTE positions with a permanent position would save human resources time in the recruitment, onboarding, and offboarding part-time, LTE staff. It would save time for the current public records team members in training new staff members, and will allow for continuity of process, which is not possible when staff is limited to 1039 hours. This new position would also improve work quality. Archivist work is performed by those with a Master's Degree in Library and/or Information Studies. Currently, WHS is able to attract as LTE staff students pursuing these degrees. This means that WHS staff spend time training employees in skills they would otherwise gain in school. The ability to hire a team member who comes to the role with these necessary skills would lead to a higher quality work product than the WHS is currently able to offer.

Additional benefits of the position include:

- Public records would be available to the public faster.
- A closer examination of incoming material would help the public records Archivists make better collecting decisions and fill gaps in critical collecting areas.
- Increased attention to arrangement and description would make material more discoverable to researchers.
- Staff expertise is leveraged for better customer service.
- State agencies and local units are able to improve records management processes, potentially saving money on physical and electronic storage costs.

Decision Item by Line

2325 Biennial Budget

| | | |
|----------------------|--------------|--------------------|
| DEPARTMENT | CODES | TITLES |
| | 245 | Historical Society |
| DECISION ITEM | CODES | TITLES |
| | 4004 | Records Management |

| | Expenditure Items | 1st Year Cost | 2nd Year Cost |
|-----------|-------------------------------------|----------------------|----------------------|
| 01 | Permanent Position Salaries | \$29,800 | \$39,700 |
| 02 | Turnover | \$0 | \$0 |
| 03 | Project Position Salaries | \$0 | \$0 |
| 04 | LTE/Misc. Salaries | (\$30,500) | (\$40,600) |
| 05 | Fringe Benefits | \$700 | \$900 |
| 06 | Supplies and Services | \$0 | \$0 |
| 07 | Permanent Property | \$0 | \$0 |
| 08 | Unallotted 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 | \$0 | \$0 |
| 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

2325 Biennial Budget

Historical Society

| Program | Decision Item/Numeric | 1st Year Total | 2nd Year Total | 1st Year FTE | 2nd Year FTE |
|---------|--------------------------------------|----------------|----------------|--------------|--------------|
| | 4004 Records Management | | | | |
| 01 | History services | | | | |
| | 20 Records management--service funds | \$0 | \$0 | 1.00 | 1.00 |
| | History services Sub Total | \$0 | \$0 | 1.00 | 1.00 |
| | Records Management Sub Total | \$0 | \$0 | 1.00 | 1.00 |
| | | | | | |
| | Agency Total | \$0 | \$0 | 1.00 | 1.00 |

Decision Item by Fund Source

2325 Biennial Budget

Historical Society

| Decision Item/Source of Funds | | 1st Year Total | 2nd Year Total | 1st Year FTE | 2nd Year FTE |
|---------------------------------|---|----------------|----------------|--------------|--------------|
| 4004 Records Management | | | | | |
| PR | S | \$0 | \$0 | 1.00 | 1.00 |
| Records Management Total | | \$0 | \$0 | 1.00 | 1.00 |
| | | | | | |
| Agency Total | | \$0 | \$0 | 1.00 | 1.00 |

Decision Item (DIN) - 4005

Decision Item (DIN) Title - Reestimates of Revenue for Continuing Appropriations

NARRATIVE

This Decision Item re-estimates agency-funded, continuing PR, FED, and SEG appropriations based on updated revenue projections, spending assumptions, and prior year actual results. Re-estimates are required due to a variety of reasons, including resumption of full operations after the COVID-19 pandemic, progress on the new History Center project, growth of certain revenue-generating functions, endowment performance, and new federal grant funding.

Decision Item by Line

2325 Biennial Budget

| | | |
|----------------------|--------------|--|
| DEPARTMENT | CODES | TITLES |
| | 245 | Historical Society |
| DECISION ITEM | CODES | TITLES |
| | 4005 | Reestimates of Revenue for Continuing Appropriations |

| | Expenditure Items | 1st Year Cost | 2nd Year Cost |
|-----------|-------------------------------------|----------------------|----------------------|
| 01 | Permanent Position Salaries | \$300,000 | \$300,000 |
| 02 | Turnover | \$0 | \$0 |
| 03 | Project Position Salaries | \$0 | \$0 |
| 04 | LTE/Misc. Salaries | \$1,392,000 | \$1,719,200 |
| 05 | Fringe Benefits | \$462,200 | \$532,400 |
| 06 | Supplies and Services | \$2,320,000 | \$3,049,700 |
| 07 | Permanent Property | \$0 | \$0 |
| 08 | Unallotted 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 | \$4,474,200 | \$5,601,300 |
| 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

2325 Biennial Budget

Historical Society

| Program | Decision Item/Numeric | 1st Year Total | 2nd Year Total | 1st Year FTE | 2nd Year FTE |
|---------|---|--------------------|--------------------|--------------|--------------|
| | 4005 Reestimates of Revenue for Continuing Appropriations | | | | |
| 01 | History services | | | | |
| | 27 General Donations | \$30,000 | \$50,000 | 0.00 | 0.00 |
| | 32 Foundation Contributed Income | \$2,000,000 | \$2,000,000 | 0.00 | 0.00 |
| | 37 General program operations, service funds | \$365,500 | \$365,500 | 0.00 | 0.00 |
| | 41 General program operations, federal funds | \$971,900 | \$1,065,500 | 0.00 | 0.00 |
| | 45 Indirect cost reimbursements | \$177,800 | \$197,800 | 0.00 | 0.00 |
| | 61 General program operations | \$104,000 | \$147,500 | 0.00 | 0.00 |
| | 63 History preservation partnership trust fund | \$825,000 | \$1,775,000 | 0.00 | 0.00 |
| | History services Sub Total | \$4,474,200 | \$5,601,300 | 0.00 | 0.00 |
| | Reestimates of Revenue for Continuing Appropriations Sub Total | \$4,474,200 | \$5,601,300 | 0.00 | 0.00 |
| | | | | | |
| | Agency Total | \$4,474,200 | \$5,601,300 | 0.00 | 0.00 |

Decision Item by Fund Source

2325 Biennial Budget

Historical Society

| Decision Item/Source of Funds | | 1st Year Total | 2nd Year Total | 1st Year FTE | 2nd Year FTE |
|---|---|--------------------|--------------------|--------------|--------------|
| 4005 Reestimates of Revenue for Continuing Appropriations | | | | | |
| PR | S | \$2,395,500 | \$2,415,500 | 0.00 | 0.00 |
| PR Federal | S | \$1,149,700 | \$1,263,300 | 0.00 | 0.00 |
| SEG | S | \$929,000 | \$1,922,500 | 0.00 | 0.00 |
| Reestimates of Revenue for Continuing Appropriations Total | | \$4,474,200 | \$5,601,300 | 0.00 | 0.00 |
| | | | | | |
| Agency Total | | \$4,474,200 | \$5,601,300 | 0.00 | 0.00 |

Decision Item (DIN) - 4006

Decision Item (DIN) Title - ADVISORY: Utilities for New or Expanded Facilities

NARRATIVE

See Budget Paper for details.



WISCONSIN
HISTORICAL
SOCIETY

2023-2025 Biennial Budget

DIN 4006: ADVISORY Utilities for New or Expanded Facilities

The Wisconsin Historical Society (“WHS” or the “Society”) has several new or expanded facilities that will be coming online at Old World Wisconsin during the 2023-25 biennium and anticipates increased utilities expenses of \$48,602 annually. WHS assumed the average cost of utilities per square foot for commercial spaces based on the 2021 estimate as published by the Public Service Commission for water, gas, and electric of \$2.10. It should be noted that utility rates increased significantly during 2022 and this rate is likely outdated and low. Existing square footage of Old World facilities is 15,313 and new square footage will be 38,457, a difference of 23,144 times \$2.10 to arrive at \$48,602. Building details are below.

Existing Facility Square Footage:

- Clausing Barn – 7,012
- Ramsey Barn – 5,516
- Lueskow House – 1,608
- Wittnebel’s Tavern – 1,177

Total – 15,313

New or Expanded Facility Square Footage:

- Clausing Barn – 11,141
- Ramsey Barn – 5,547
- Lueskow House – 1,612
- Wittnebel’s Tavern – 1,732
- Beer Garden – 9,000
- Guest Services Center – 5,146 (not including plaza)
- Tram Station – 1,000
- Pavilion – 3,279

Total – 38,457

Decision Item by Line

2325 Biennial Budget

| | | |
|----------------------|--------------|--|
| DEPARTMENT | CODES | TITLES |
| | 245 | Historical Society |
| DECISION ITEM | CODES | TITLES |
| | 4006 | ADVISORY: Utilities for New or Expanded Facilities |

| | 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 | \$0 | \$0 |
| 08 | Unallotted 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 | \$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

| Program | Decision Item/Numeric | 1st Year Total | 2nd Year Total | 1st Year FTE | 2nd Year FTE |
|----------------|------------------------------|-----------------------|-----------------------|---------------------|---------------------|
| | | | | | |
| | Agency Total | | | | |

Decision Item by Fund Source

| Decision Item/Source of Funds | 1st Year Total | 2nd Year Total | 1st Year FTE | 2nd Year FTE |
|-------------------------------|----------------|----------------|--------------|--------------|
| | | | | |
| Agency Total | | | | |

ACT 201

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

FY: **FY24**

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 "FY24" TO "FY24 AND 25".

| Agency | Appropriation | | Fund Source | Adjusted Base | | (See Note 1) | Proposed Budget 2023-24 | | | Change from Adj Base | | (See Note 2) | | Change from Adjusted Base after Removal of SBAs | |
|---------------|---------------|---------|-------------|-------------------|---------------|------------------|-------------------------|---------------|-----------|----------------------|-------------|------------------|-------------|---|-------------|
| | Alpha | Numeric | | \$ | FTE | 0% Change Target | Proposed \$ | Proposed FTE | Item Ref. | \$ | FTE | \$ | FTE | \$ | FTE |
| 245 | 1a | 101 | GPR | \$16,566,900.00 | 112.65 | 0 | 17,777,800 | 116.65 | 3 | 1,210,900 | 4.00 | 87,800 | 0.00 | 1,298,700 | 4.00 |
| 245 | 1c | 105 | GPR | \$812,100.00 | 0.00 | 0 | 812,100 | 0.00 | | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 |
| 245 | 1h | 132 | PR | \$936,800.00 | 5.60 | 0 | 587,200 | 5.60 | 1 | (349,600) | 0.00 | 349,600 | 0.00 | 0 | 0.00 |
| 245 | 1h | 127 | PR | \$100,000.00 | 0.00 | 0 | 100,000 | 0.00 | 1 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 |
| 245 | 1k | 138 | PR | \$268,800.00 | 2.00 | 0 | 341,600 | 2.00 | 2 | 72,800 | 0.00 | (72,800) | 0.00 | 0 | 0.00 |
| 245 | 1km | 136 | PR | \$236,300.00 | 2.75 | 0 | 236,800 | 2.75 | | 500 | 0.00 | (500) | 0.00 | 0 | 0.00 |
| 245 | 1ks | 137 | PR | \$1,727,000.00 | 11.00 | 0 | 1,734,500 | 11.00 | 1 | 7,500 | 0.00 | (7,500) | 0.00 | 0 | 0.00 |
| 245 | 1kw | 120 | PR | \$273,100.00 | 2.00 | 0 | 282,700 | 3.00 | | 9,600 | 1.00 | (9,600) | 0.00 | 0 | 1.00 |
| 245 | 1q | 161 | SEG | \$651,600.00 | 5.25 | 0 | 622,700 | 5.25 | 1 | (28,900) | 0.00 | 28,900 | 0.00 | 0 | 0.00 |
| 245 | 1r | 163 | SEG | \$3,478,800.00 | 26.59 | 0 | 2,794,900 | 26.59 | 1, 3 | (683,900) | 0.00 | (614,800) | 0.00 | (1,298,700) | 0.00 |
| 245 | 1y | 164 | SEG | \$73,100.00 | 1.00 | 0 | 82,700 | 1.00 | | 9,600 | 0.00 | (9,600) | 0.00 | 0 | 0.00 |
| Totals | | | | 25,124,500 | 168.84 | 0 | 25,373,000 | 173.84 | | 248,500 | 5.00 | (248,500) | 0.00 | 0 | 5.00 |

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 Remove DIN 4005 Reestimates of Revenue for Continuing Appropriations
- 2 Remove DIN 4002 Wisconsin History Center
- 3 The Historical Society would use a combination of methods to reach the remaining 0% reduction target, including use of existing cash balances in available appropriations, increased revenue strategies, cost reductions, and strategic position management

ACT 201

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

FY: **FY24**

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 "FY24" TO "FY24 AND 25".

| Agency | Appropriation | | Fund Source | Adjusted Base | | (See Note 1) | Proposed Budget 2023-24 | | | Change from Adj Base | | (See Note 2) | | Change from Adjusted Base after Removal of SBAs | |
|---------------|---------------|---------|-------------|-------------------|---------------|---------------------|-------------------------|---------------|-----------|----------------------|-------------|------------------|-------------|---|-------------|
| | Alpha | Numeric | | \$ | FTE | 5% Reduction Target | Proposed \$ | Proposed FTE | Item Ref. | \$ | FTE | \$ | FTE | \$ | FTE |
| 245 | 1a | 101 | GPR | \$16,566,900.00 | 112.65 | (828,300) | 16,479,100 | 116.65 | 3, 4 | (87,800) | 4.00 | 87,800 | 0.00 | 0 | 4.00 |
| 245 | 1c | 105 | GPR | \$812,100.00 | 0.00 | (40,600) | 812,100 | 0.00 | | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 |
| 245 | 1h | 132 | PR | \$936,800.00 | 5.60 | (46,800) | 587,200 | 5.60 | 1 | (349,600) | 0.00 | 349,600 | 0.00 | 0 | 0.00 |
| 245 | 1h | 127 | PR | \$100,000.00 | 0.00 | (5,000) | 100,000 | 0.00 | 1 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 |
| 245 | 1k | 138 | PR | \$268,800.00 | 2.00 | (13,400) | 341,600 | 2.00 | 2 | 72,800 | 0.00 | (72,800) | 0.00 | 0 | 0.00 |
| 245 | 1km | 136 | PR | \$236,300.00 | 2.75 | (11,800) | 236,800 | 2.75 | | 500 | 0.00 | (500) | 0.00 | 0 | 0.00 |
| 245 | 1ks | 137 | PR | \$1,727,000.00 | 11.00 | (86,400) | 1,734,500 | 11.00 | 1 | 7,500 | 0.00 | (7,500) | 0.00 | 0 | 0.00 |
| 245 | 1kw | 120 | PR | \$273,100.00 | 2.00 | (13,700) | 282,700 | 3.00 | | 9,600 | 1.00 | (9,600) | 0.00 | 0 | 1.00 |
| 245 | 1q | 161 | SEG | \$651,600.00 | 5.25 | (32,600) | 622,700 | 5.25 | 1 | (28,900) | 0.00 | 28,900 | 0.00 | 0 | 0.00 |
| 245 | 1r | 163 | SEG | \$3,478,800.00 | 26.59 | (173,900) | 2,837,400 | 26.59 | 1, 4 | (641,400) | 0.00 | (614,800) | 0.00 | (1,256,200) | 0.00 |
| 245 | 1y | 164 | SEG | \$73,100.00 | 1.00 | (3,700) | 82,700 | 1.00 | | 9,600 | 0.00 | (9,600) | 0.00 | 0 | 0.00 |
| Totals | | | | 25,124,500 | 168.84 | (1,256,200) | 24,116,800 | 173.84 | | (1,007,700) | 5.00 | (248,500) | 0.00 | (1,256,200) | 5.00 |

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 = (1,256,200)

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

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

- 1 Remove DIN 4005 Reestimates of Revenue for Continuing Appropriations
- 2 Remove DIN 4002 Wisconsin History Center
- 3 Remove DIN 4001 Information Technology Services
- 4 The Historical Society would use a combination of methods to reach the remaining 5% reduction target, including use of existing cash balances in available appropriations, increased revenue strategies, cost reductions, and strategic position management
- 5

ACT 201

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

FY: **FY25**

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 "FY24" TO "FY24 AND 25".

| Agency | Appropriation | | Fund Source | Adjusted Base | | (See Note 1) | Proposed Budget 2024-25 | | 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 | \$16,566,900.00 | 112.65 | 0 | 17,702,800 | 116.65 | 3 | 1,135,900 | 4.00 | 87,800 | 0.00 | 1,223,700 | 4.00 |
| 245 | 1c | 105 | GPR | \$812,100.00 | 0.00 | 0 | 812,100 | 0.00 | | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 |
| 245 | 1h | 132 | PR | \$936,800.00 | 5.60 | 0 | 587,200 | 5.60 | 1 | (349,600) | 0.00 | 349,600 | 0.00 | 0 | 0.00 |
| 245 | 1h | 127 | PR | \$100,000.00 | 0.00 | 0 | 100,000 | 0.00 | 1 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 |
| 245 | 1k | 138 | PR | \$268,800.00 | 2.00 | 0 | 341,600 | 2.00 | 2 | 72,800 | 0.00 | (72,800) | 0.00 | 0 | 0.00 |
| 245 | 1km | 136 | PR | \$236,300.00 | 2.75 | 0 | 236,800 | 2.75 | | 500 | 0.00 | (500) | 0.00 | 0 | 0.00 |
| 245 | 1ks | 137 | PR | \$1,727,000.00 | 11.00 | 0 | 1,734,500 | 11.00 | 1 | 7,500 | 0.00 | (7,500) | 0.00 | 0 | 0.00 |
| 245 | 1kw | 120 | PR | \$273,100.00 | 2.00 | 0 | 282,700 | 3.00 | | 9,600 | 1.00 | (9,600) | 0.00 | 0 | 1.00 |
| 245 | 1q | 161 | SEG | \$651,600.00 | 5.25 | 0 | 622,700 | 5.25 | 1 | (28,900) | 0.00 | 28,900 | 0.00 | 0 | 0.00 |
| 245 | 1r | 163 | SEG | \$3,478,800.00 | 26.59 | 0 | 2,869,900 | 26.59 | 1, 3 | (608,900) | 0.00 | (614,800) | 0.00 | (1,223,700) | 0.00 |
| 245 | 1y | 164 | SEG | \$73,100.00 | 1.00 | 0 | 82,700 | 1.00 | | 9,600 | 0.00 | (9,600) | 0.00 | 0 | 0.00 |
| Totals | | | | 25,124,500 | 168.84 | 0 | 25,373,000 | 173.84 | | 248,500 | 5.00 | (248,500) | 0.00 | 0 | 5.00 |

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 Remove DIN 4005 Reestimates of Revenue for Continuing Appropriations
- 2 Remove DIN 4002 Wisconsin History Center
- 3 The Historical Society would use a combination of methods to reach the remaining 0% reduction target, including use of existing cash balances in available appropriations, increased revenue strategies, cost reductions, and strategic position management

ACT 201

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

FY: **FY25**

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 "FY24" TO "FY24 AND 25".

| Agency | Appropriation | | Fund Source | Adjusted Base | | (See Note 1) | Proposed Budget 2024-25 | | | Change from Adj Base | | (See Note 2) | Change from Adjusted Base after Removal of SBAs | | |
|---------------|---------------|---------|-------------|-------------------|---------------|---------------------|-------------------------|---------------|-----------|----------------------|-------------|------------------|---|--------------------|-------------|
| | Alpha | Numeric | | \$ | FTE | 5% Reduction Target | Proposed \$ | Proposed FTE | Item Ref. | \$ | FTE | Remove SBAs | \$ | FTE | |
| 245 | 1a | 101 | GPR | \$16,566,900.00 | 112.65 | (828,300) | 16,479,100 | 116.65 | 3, 4 | (87,800) | 4.00 | 87,800 | 0.00 | 0 | 4.00 |
| 245 | 1c | 105 | GPR | \$812,100.00 | 0.00 | (40,600) | 812,100 | 0.00 | | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 |
| 245 | 1h | 132 | PR | \$936,800.00 | 5.60 | (46,800) | 587,200 | 5.60 | 1 | (349,600) | 0.00 | 349,600 | 0.00 | 0 | 0.00 |
| 245 | 1h | 127 | PR | \$100,000.00 | 0.00 | (5,000) | 100,000 | 0.00 | 1 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 |
| 245 | 1k | 138 | PR | \$268,800.00 | 2.00 | (13,400) | 341,600 | 2.00 | 2 | 72,800 | 0.00 | (72,800) | 0.00 | 0 | 0.00 |
| 245 | 1km | 136 | PR | \$236,300.00 | 2.75 | (11,800) | 236,800 | 2.75 | | 500 | 0.00 | (500) | 0.00 | 0 | 0.00 |
| 245 | 1ks | 137 | PR | \$1,727,000.00 | 11.00 | (86,400) | 1,734,500 | 11.00 | 1 | 7,500 | 0.00 | (7,500) | 0.00 | 0 | 0.00 |
| 245 | 1kw | 120 | PR | \$273,100.00 | 2.00 | (13,700) | 282,700 | 3.00 | | 9,600 | 1.00 | (9,600) | 0.00 | 0 | 1.00 |
| 245 | 1q | 161 | SEG | \$651,600.00 | 5.25 | (32,600) | 622,700 | 5.25 | 1 | (28,900) | 0.00 | 28,900 | 0.00 | 0 | 0.00 |
| 245 | 1r | 163 | SEG | \$3,478,800.00 | 26.59 | (173,900) | 2,837,400 | 26.59 | 1, 4 | (641,400) | 0.00 | (614,800) | 0.00 | (1,256,200) | 0.00 |
| 245 | 1y | 164 | SEG | \$73,100.00 | 1.00 | (3,700) | 82,700 | 1.00 | | 9,600 | 0.00 | (9,600) | 0.00 | 0 | 0.00 |
| Totals | | | | 25,124,500 | 168.84 | (1,256,200) | 24,116,800 | 173.84 | | (1,007,700) | 5.00 | (248,500) | 0.00 | (1,256,200) | 5.00 |

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 = (1,256,200)

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

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

- 1 Remove DIN 4005 Reestimates of Revenue for Continuing Appropriations
- 2 Remove DIN 4002 Wisconsin History Center
- 3 Remove DIN 4001 Information Technology Services
- 4 The Historical Society would use a combination of methods to reach the remaining 5% reduction target, including use of existing cash balances in available appropriations, increased revenue strategies, cost reductions, and strategic position management
- 5