

HISTORICAL SOCIETY

GOVERNOR'S BUDGET RECOMMENDATIONS

Source of Funds	FY21 Adjusted Base	FY22 Recommended	% Change Over FY21	FY23 Recommended	% Change Over FY22
GPR	21,957,000	22,028,700	0.3	22,267,900	1.1
PR-F	1,390,800	1,549,300	11.4	1,549,500	0.0
PR-O	1,006,700	2,099,000	108.5	4,049,200	92.9
PR-S	2,296,500	2,617,900	14.0	2,619,400	0.1
SEG-O	4,763,200	3,954,100	-17.0	4,931,700	24.7
TOTAL	31,414,200	32,249,000	2.7	35,417,700	9.8

FULL-TIME EQUIVALENT POSITION SUMMARY

Source of Funds	FY21 Adjusted Base	FY22 Recommended	FTE Change Over FY21	FY23 Recommended	FTE Change Over FY22
GPR	112.65	112.65	0.00	112.65	0.00
PR-F	8.86	8.86	0.00	8.86	0.00
PR-O	9.00	9.00	0.00	9.00	0.00
PR-S	17.75	17.75	0.00	17.75	0.00
SEG-O	33.28	33.28	0.00	33.28	0.00
TOTAL	181.54	181.54	0.00	181.54	0.00

AGENCY DESCRIPTION

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

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

Division of Library, Archives and Museum Collections

The society operates the world's largest library and archives dedicated exclusively to North American history on behalf of Wisconsin citizens, an international array of scholars and the University of Wisconsin, for which the society serves as the North American history library. Its extensive collections include nearly four million books, pamphlets, newspapers, government records, business records, maps, unpublished archival items, personal memoirs, diaries and journals, as well as four million historic photographs. The society's museum collections encompass all of Wisconsin and include over 267,000 artifacts and 375,000 archaeological items.

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

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

Division of Museums and Historic Sites

The society owns and operates the Wisconsin Historical Museum and 12 historic sites, which share stories of Wisconsin's physical and cultural heritage. These sites also promote tourism and economic development.

State Historic Preservation Office

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

Office of Programs and Outreach

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

MISSION

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

PROGRAMS, GOALS, OBJECTIVES AND ACTIVITIES

Note: Goals, objectives and activities have been modified.

Program 1: History Services

Goal: Expedite the preservation of places of enduring value.

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

Objective/Activity: Facilitate Wisconsin's historic preservation programs, including private investment in historic properties utilizing the state and federal historic building rehabilitation tax credit programs.

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

Objective/Activity: Publish and distribute highly valued and widely read Wisconsin Historical Society Press (WHSP) books sold to general audiences.

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

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

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

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

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

Objective/Activity: 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

2019 AND 2020 GOALS AND ACTUALS

Prog. No.	Performance Measure	Goal 2019	Actual 2019	Goal 2020	Actual 2020 ¹
1.	Number of buildings rehabilitated using the rehabilitation tax credit programs.	310	348	310	390
1.	Rehabilitation tax credit value.	\$70,000,000	\$32,800,000	\$70,000,000	\$64,400,000
1.	Number of WHSP books sold or distributed through all channels.	46,500	46,567	47,000	37,162
1.	Number of WHSP student titles and textbooks sold and distributed.	12,500	6,232	14,500	7,655
1.	Number of participants in National History Day program.	17,000	16,000	17,250	15,000
1.	Number of local history affiliate consultations.	700	454	750	269
1.	People engaged in new museum development process.	1,600	5,297	2,000	996
1.	Percentage of all prepared archival, library and artifacts collections transferred to State Archive Preservation Facility (includes artifacts at Wisconsin Historical Museum).	100%	100%	N/A	N/A
1.	Number of collection donations (donor transactions).	1,420	242	1,500	189
1.	Number of patrons served through State Archives and North American History Library.	190,000	175,408	190,000	133,790
1.	Number of agencies provided with e-records assistance.	26	32	28	20
1.	Number of local governments served via in-person consultations.	15	100	20	88
1.	Attendance at museums and historic sites.	273,000	235,309	275,000	142,342
1.	K-12 student attendance at museums and historic sites.	54,000	54,713	55,000	17,153
1.	Unique visits to Web site content.	4,800,000	4,486,007	4,800,000	5,425,966
1.	Total Wisconsin Historical Society members.	12,800	11,976	13,000	10,680
1.	Value of deferred maintenance at Wisconsin Historical Society facilities.	\$11,400,000	\$10,448,900	\$10,900,000	\$8,276,100

Note: Based on fiscal year.

¹Actuals for 2020 were impacted by COVID-19.

2021, 2022 AND 2023 GOALS

Prog. No.	Performance Measure	Goal 2021¹	Goal 2022	Goal 2023
1.	Number of buildings rehabilitated using the rehabilitation tax credit programs.	300	350	350
1.	Total tax credit project investment. ²	\$100 million	\$120 million	\$120 million
1.	Number of WHSP books sold or distributed through all channels.	15,235	25,000	42,000
1.	Number of WHSP student titles and textbooks sold and distributed.	2,500	3,125	4,000
1.	Number of participants in National History Day program.	10,000	15,000	17,000
1.	Number of local history affiliate consultations.	550	600	640
1.	People engaged in new museum development process.	1,500	1,500	1,500
1.	Number of collection donations (donor transactions).	200	215	230
1.	Number of patrons served through State Archives and North American History Library.	15,000	60,000	130,000
1.	Number of agencies provided with e-records assistance.	15	25	28
1.	Number of local governments served via in-person consultations.	15	20	25
1.	Attendance at museums and historic sites.	68,000	140,000	250,000
1.	K-12 student attendance at museums and historic sites.	0 (in person) 5,000 (virtual)	20,000 10,000	40,000 20,000
1.	Unique visits to Web site content.	5,700,000	5,700,000	5,700,000
1.	Total Wisconsin Historical Society members.	11,000	11,500	12,000
1.	Value of deferred maintenance at Wisconsin Historical Society facilities.	\$6,808,400	\$5,396,400	\$5,052,900

Note: Based on fiscal year.

¹Some goals for 2021 have been revised due to COVID-19. The society expects that it will take a few years to get back to fiscal year 2018-19 service levels.

²Performance measure has been revised for 2021-23 biennium.

HISTORICAL SOCIETY

GOVERNOR'S BUDGET RECOMMENDATIONS

RECOMMENDATIONS

1. Black Historical Society
2. Reestimate of History Preservation Appropriation
3. Minor Transfers Between Alpha Appropriations
4. Fuel and Utilities Reestimate
5. Debt Service Reestimate
6. Standard Budget Adjustments

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

	ACTUAL FY20	ADJUSTED BASE FY21	AGENCY REQUEST		GOVERNOR'S RECOMMENDATION	
			FY22	FY23	FY22	FY23
GENERAL PURPOSE REVENUE	\$20,948.4	\$21,957.0	\$23,096.8	\$23,096.8	\$22,028.7	\$22,267.9
State Operations	20,863.9	21,872.5	23,012.3	23,012.3	21,859.7	22,098.9
Aids to Ind. & Org.	84.5	84.5	84.5	84.5	169.0	169.0
FEDERAL REVENUE (1)	\$1,070.5	\$1,390.8	\$1,549.3	\$1,549.5	\$1,549.3	\$1,549.5
State Operations	1,070.5	1,390.8	1,549.3	1,549.5	1,549.3	1,549.5
PROGRAM REVENUE (2)	\$3,686.1	\$3,303.2	\$3,840.7	\$3,842.3	\$4,716.9	\$6,668.6
State Operations	3,686.1	3,303.2	3,840.7	3,842.3	4,716.9	6,668.6
SEGREGATED REVENUE (3)	\$2,168.9	\$4,763.2	\$3,954.1	\$4,931.7	\$3,954.1	\$4,931.7
State Operations	2,168.9	4,763.2	3,954.1	4,931.7	3,954.1	4,931.7
TOTALS - ANNUAL	\$27,873.9	\$31,414.2	\$32,440.9	\$33,420.3	\$32,249.0	\$35,417.7
State Operations	27,789.4	31,329.7	32,356.4	33,335.8	32,080.0	35,248.7
Aids to Ind. & Org.	84.5	84.5	84.5	84.5	169.0	169.0

- (1) Includes Program Revenue-Federal and Segregated Revenue-Federal
- (2) Includes Program Revenue-Service and Program Revenue-Other
- (3) Includes Segregated Revenue-Service, Segregated Revenue-Other and Segregated Revenue-Local

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

	ADJUSTED BASE FY21	AGENCY REQUEST		GOVERNOR'S RECOMMENDATION	
		FY22	FY23	FY22	FY23
GENERAL PURPOSE REVENUE	112.65	112.65	112.65	112.65	112.65
FEDERAL REVENUE (1)	8.86	8.86	8.86	8.86	8.86
PROGRAM REVENUE (2)	26.75	26.75	26.75	26.75	26.75
SEGREGATED REVENUE (3)	33.28	33.28	33.28	33.28	33.28
TOTALS - ANNUAL	181.54	181.54	181.54	181.54	181.54

- (1) Includes Program Revenue-Federal and Segregated Revenue-Federal
- (2) Includes Program Revenue-Service and Program Revenue-Other
- (3) Includes Segregated Revenue-Service, Segregated Revenue-Other and Segregated Revenue-Local
- (4) All positions are State Operations unless otherwise specified

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

	ACTUAL FY20	ADJUSTED BASE FY21	AGENCY REQUEST		GOVERNOR'S RECOMMENDATION	
			FY22	FY23	FY22	FY23
1. History services	\$27,873.9	\$31,414.2	\$32,440.9	\$33,420.3	\$32,249.0	\$35,417.7
TOTALS	\$27,873.9	\$31,414.2	\$32,440.9	\$33,420.3	\$32,249.0	\$35,417.7

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

	ADJUSTED BASE FY21	AGENCY REQUEST		GOVERNOR'S RECOMMENDATION	
		FY22	FY23	FY22	FY23
1. History services	181.54	181.54	181.54	181.54	181.54
TOTALS	181.54	181.54	181.54	181.54	181.54

(4) All positions are State Operations unless otherwise specified

1. Black Historical Society

Source of Funds	Agency Request				Governor's Recommendations			
	FY22		FY23		FY22		FY23	
	Dollars	Positions	Dollars	Positions	Dollars	Positions	Dollars	Positions
GPR	0	0.00	0	0.00	84,500	0.00	84,500	0.00
TOTAL	0	0.00	0	0.00	84,500	0.00	84,500	0.00

The Governor recommends increasing funding for the Black Historical Society.

2. Reestimate of History Preservation Appropriation

Source of Funds	Agency Request				Governor's Recommendations			
	FY22		FY23		FY22		FY23	
	Dollars	Positions	Dollars	Positions	Dollars	Positions	Dollars	Positions
SEG-O	-2,074,700	0.00	-1,097,100	0.00	-2,074,700	0.00	-1,097,100	0.00
TOTAL	-2,074,700	0.00	-1,097,100	0.00	-2,074,700	0.00	-1,097,100	0.00

The Governor recommends adjusting the society's history preservation partnership trust fund appropriation to reflect a reduction in earned revenue due to the COVID-19 pandemic.

3. Minor Transfers Between Alpha Appropriations

The Governor recommends transferring 0.2 FTE position authority and associated funding from the society's federal aids appropriation to the society's federal indirect cost reimbursements appropriation to comply with federal grant requirements.

4. Fuel and Utilities Reestimate

Source of Funds	Agency Request				Governor's Recommendations			
	FY22		FY23		FY22		FY23	
	Dollars	Positions	Dollars	Positions	Dollars	Positions	Dollars	Positions
GPR	0	0.00	0	0.00	-103,600	0.00	-102,300	0.00
TOTAL	0	0.00	0	0.00	-103,600	0.00	-102,300	0.00

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

5. Debt Service Reestimate

Source of Funds	Agency Request				Governor's Recommendations			
	FY22		FY23		FY22		FY23	
	Dollars	Positions	Dollars	Positions	Dollars	Positions	Dollars	Positions
GPR	0	0.00	0	0.00	-565,700	0.00	-327,800	0.00
PR-O	0	0.00	0	0.00	876,200	0.00	2,826,300	0.00
TOTAL	0	0.00	0	0.00	310,500	0.00	2,498,500	0.00

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

6. Standard Budget Adjustments

Source of Funds	Agency Request				Governor's Recommendations			
	FY22		FY23		FY22		FY23	
	Dollars	Positions	Dollars	Positions	Dollars	Positions	Dollars	Positions
GPR	1,139,800	0.00	1,139,800	0.00	656,500	0.00	656,500	0.00
PR-F	158,500	0.00	158,700	0.00	158,500	0.00	158,700	0.00
PR-O	216,100	0.00	216,200	0.00	216,100	0.00	216,200	0.00
PR-S	321,400	0.00	322,900	0.00	321,400	0.00	322,900	0.00
SEG-O	1,265,600	0.00	1,265,600	0.00	1,265,600	0.00	1,265,600	0.00
TOTAL	3,101,400	0.00	3,103,200	0.00	2,618,100	0.00	2,619,900	0.00

The Governor recommends adjusting the society's base budget for: (a) turnover reduction (-\$194,800 in each year); (b) full funding of continuing position salaries and fringe benefits (\$3,265,300 in each year); (c) overtime (\$7,300 in each year); (d) night and weekend differential pay (\$12,400 in each year); and (e) full funding of lease and directed moves costs (-\$472,100 in FY22 and -\$470,300 in FY23).