

Committee Name:
Joint Committee – Finance
(JC–Fi)

Appointments

99hr_JC–Fi_Appt_pt00

Committee Hearings

99hr_JC–Fi_CH_pt00

Committee Reports

99hr_JC–Fi_CR_pt00

Clearinghouse Rules

99hr_JC–Fi_CRule_99–

Executive Sessions

99hr_JC–Fi_ES_pt00

Hearing Records

99hr_ab0000

99hr_sb0000

Misc.

99hr_JC–Fi__Misc__s.13.10_pt01j

Record of Committee Proceedings

99hr_JC–Fi_RCP_pt00

S. 13.10 REQUESTS

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State Historical Society of Wisconsin

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DATE: November 26, 1999

TO: Senator Brian Burke, Senate Chair
Representative John Gard, Assembly Chair
Members, Joint Committee on Finance

FROM: George Vogt, Director
State Historical Society

SUBJECT: Requests to Move GPR Dollars and Positions Between Appropriations and Create a GPR Position

Brief Summary of the Request

The Society requests (a) the transfer of \$55,800 GPR and a 1.00 GPR classified position from the appropriation under section 20.245(1)(a) to the appropriation under section 20.245(4)(a) for the creation of a Society Technology Director, (b) the transfer of \$104,900 GPR and a 1.00 GPR unclassified position from the appropriation under 20.245(1)(am) to the appropriation under 20.245(4)(a) for the creation of an Executive Assistant, (c) the creation of a 1.00 GPR Library Consultant position in the appropriation under section 20.245(1)(am) to establish a digital collections program in the Library and Archives and (d) the transfer of \$12,000 GPR and a 0.25 GPR position from the appropriation under section 20.245(1)(a) to the appropriation under section 20.245(4)(a) to substitute for 25% of a mail room position funded with PRO by the membership program.

Background of the Request

Over the last two years, the Society has been heavily involved with strategic planning. Among other things, that effort has resulted in the need for a greater focus on Society audiences – both understanding what services they want and how service delivery should be improved to meet their needs. As a result of those discussions, several high priority positions the Society presently is not authorized were identified. In an attempt to address these needs, difficult decisions about doing business differently have been proposed and vacant positions have been considered for reallocation rather than requesting new ones.

a. Technology Director

Following the departure of the Deputy State Archivist, that GPR position has been kept vacant for possible reallocation. The Society's management team identified the creation of a position to head the agency's information technology (IT) program as the top reallocation priority. That conclusion followed a GartnerMeasurement study finalized in January, 1999, and discussions about the state of planning and support for the Society's

IT program. Although the Society has some 320 IT users and 225 workstations (about 90% in the Madison area), the agency only has two IT staff – well under any benchmark of staffing. As with many other state agencies, IT is an integral and critical part of daily service internally and externally – since the Society is predominantly an “information” agency. The Society has huge public databases of several million items in the Library, Archives, Museum and Historic Sites collections and of historic and archeological properties the responsibility of Historic Preservation. Among other things, the Technology Director would coordinate Society-wide IT planning, the development of e-commerce opportunities, the increased usage of the agency’s web site (which has grown and continue to grow rapidly) and the provision of other IT services.

b. Executive Assistant

Following the departure of the State Historical Librarian, that position was left open while an evaluation was undertaken to consider the possible merger of the Archives and Library operations. The Society has committed to that merger (which has been approved by the Board of Curators), and a formal merger request is being prepared for the Department of Administration and Governor. Approval of that request would allow the unclassified State Historical Librarian position to be used for a high priority need.

During the last year, the Society has been working on a number of major issues. Among others, they include a three-year strategic plan, preliminary work for a capital campaign, the possible incorporation of a new State Historical Museum into a building being planned by a private developer, efforts to establish a National History Day program and the Heritage Trust program, the development of the H. H. Bennett photographic studio as a new historic site and the construction of an additional Society public access building in the Madison area. The addition of another position in the Director’s Office would greatly assist with these and other such projects. The need for such a position will become even more important as the Director has to devote an increasing amount of his time in the preparation for and implementation of the Society’s first comprehensive capital campaign.

c. Library Consultant Digitization Position

The 1999-2001 budget bill provided that \$205,000 GPR in the Archives program funding a state government records appraisal project (first initiated in July, 1995) was to be shifted permanently to the Library program on July 1, 2000, at the conclusion of the appraisal project. In light of the above-mentioned proposal to merge the Archives and Library operations, the State Archivist (who would head the new division if the merger is approved), has been considering how best to program the use of the \$205,000. As the result of Society strategic planning discussions and user feedback from both programs, a strong demand for more digital services was identified. Examples include converting collections of photographs, books, journals, newspapers and historical records to digital formats and placing them on the Internet.

The Society considered hiring a consultant with a portion of the \$205,000 to plan, coordinate and implement projects that would create digital versions of information about Society collections and computerized access tools to them. Since this need is expected to

continue, the creation of a permanent position is proposed. The position would also coordinate the preparation of grant applications on digitization to leverage the state investment. Since the Society already has funding which could be used for the position and LTE assistance (estimated to use \$84,000 in total), the Society only requests the creation of a GPR Library Consultant position.

d. Substitute Funding for a Mail Room Position

Recently, an opportunity presented itself to rectify a funding problem in the Society's mailroom, which includes 1.5 positions. The half-time position is funded 25% GPR and 25% PRO (with membership monies). The latter FTE was assumed to represent the position's time devoted to membership program mailings. That has not been the case for a long time. The request is to substitute 0.25 GPR of an Archives program position freed up as a result of the same corresponding permanent reduction in the employe's FTE. Consequently, the Society requests the transfer of \$13,000 GPR and a 0.25 GPR position from the Archives to the Administrative Services program.

How the Requests Meet Statutory Criteria

The three transfers fall under section 13.101(4). The transfers to create the Technology Director and Executive Assistant positions address long-term, critical position needs without asking for new position authority – therefore, more efficient and effective ways of deploying them. Positions to reallocate for the Technology Director and the Executive Assistant (assuming approval of the proposed merger) are available and needed as soon as possible. The transfer of the 0.25 FTE GPR Archives position will correct a funding issue.

The creation of the Library Consultant falls under section 13.101(2) and represents the delayed programming of a portion of the funding to be transferred from the Archives to the Library. The request is made now to allow recruitment with a fill date of July 1, 2000, when the funding shift is effective.

The Society will be represented at the second quarterly meeting by myself and the Associate Director, Bob Thomasgard.