

**Strategic Program Area 2: Historical Society**

Service Provision: **Discretionary**

<b>How We Do It: Program Budget Summary</b>					
<b>Category</b>	<b>2019 Actual</b>	<b>2020 Actual</b>	<b>2021 Budget</b>	<b>2022 Budget</b>	<b>2022/2021 Variance</b>
<b>Expenditures</b>	\$258,105	\$258,105	\$258,105	\$304,105	\$46,000
<b>Revenues</b>	\$0	\$0	\$0	\$0	\$ 0
<b>Tax Levy</b>	\$258,105	\$258,105	\$258,105	\$304,105	\$46,000

<b>What We Do With It: Activity Data</b>				
<b>Activity</b>	<b>2019 Actual</b>	<b>2020 Actual</b>	<b>2021 Target</b>	<b>2022 Target</b>
Attendance-Public (General)	7,629	2,964	9,000	9,000
Attendance-Public (Programming)	8,567	22,980	5,000	5,000
Attendance-Other	2,636	134	4,000	4,000
Research Requests	4,271	2,007	5,000	5,000

<b>How Well We Do It: Performance Measures</b>				
<b>Performance Measure</b>	<b>2019 Actual</b>	<b>2020 Actual</b>	<b>2021 Target</b>	<b>2022 Target</b>
Annual % Increase in Patron Usage of MCHS Resource Material	-3%*	-53%	5%**	5%
Annual % Increase in Overall Attendance (for all MCHS Operated Facilities)	25%*	38%	5%**	5%

*\*Due to construction on outside cornice, attendance has been impacted 2017-2019.*

*2021 Targets are a goal and may change throughout the year as the MCHS better understands the impact of the COVID-19 Pandemic on our 2020 Target/Actuals.*

**Strategic Overview:**

The Milwaukee County Historical Society (MCHS) was founded as a service provider to the County and continues to serve in this role by preserving and making accessible important County records. Through the research library, people can access essential vital records including documents that prove relationships or verify citizenship. As a cultural organization, MCHS offers exhibits, programs and special events, educational field trips and school visits, and more.

As directed by the Board of Supervisors and County Administration, the MCHS continues to evaluate and improve operations to achieve the highest levels of efficiency.

*Notes of Operation:*

- **Coronavirus Pandemic Impacts:**
  - The MCHS was closed from March 14, 2020 through June 28, 2020 due to the Coronavirus pandemic. This closure had significant impacts on the MCHS finances and visitor numbers. Only recently are we starting to see visitor rates rise in a significant way.

- During the closure, the MCHS continued to carry out its mandate of making historical documents available to the public. Requests for vital documents were fulfilled during this time with no lapse in service.
  - The long-term impact to the MCHS is unclear as the situation continues to unfold, however, the organization will continue to monitor its fiscal health moving forward.
  - To serve the public through the pandemic, MCHS offered more than 35 free, virtual programs. School students and educators were served like never before through digital resources and interactive digital Hands-on History visits by our educator with local classrooms. MCHS was pleased to serve a few thousand students this year despite not being able to visit in person.
- MCHS and Milwaukee County Parks Department are working on an operating agreement for Kilbourntown House in Estabrook Park and Trimborn Farm in Greendale. The MCHS will assume all responsibility except for mechanicals; an increased responsibility for MCHS.

#### *MCHS and County Record Retention: A Critical Time is Now*

The MCHS was founded to carry out the state statute of third-party record retention for Milwaukee County. Since 1935, the Society has served the county in this role by retaining and preserving documents such as naturalization records, civil court records, documents from elected officials, maps, etc. Due to this role in record retention, MCHS is a service provider to Milwaukee County. The state statute requires that a third party serves in this role and has this relationship with the County. No other entity has the qualifications or experience.

Beginning in 2020, the County started transferring digital records to the MCHS for archival management. The first deposit that was offered to MCHS included unstable files/infrastructure. The MCHS intended to build infrastructure and to address the instability of these documents. Unfortunately, the state of the County's infrastructure was very poor and, so much so, that the files were lost. The County, MCHS, and partners that were approached were unable to preserve these files. More than six years of County emails can no longer be accessed.

That said, the Society does not want to encounter this situation again and is certain the County does not as well. The County has been creating and storing digital files for at least two decades and a process to retain, organize and transfer them is not in place. This is a significant issue for the County, for MCHS in obtaining and preserving them for years to come, and most significantly, for the people of Milwaukee who will one day need these records.

MCHS has made digitization a priority and this is two-fold:

- 1) MCHS must work with the County to set new protocols for digital file organization and storage. This will ensure that files that should be retained by the County can be retained, and, if schedules require, transferred to MCHS on schedule.
- 2) MCHS must digitize vital and important records from the past so that they exist in more than just their original paper form. Currently, a process of planning has begun but this is a significant project and a very large undertaking of capacity and resources.

MCHS is committed to the preservation of Milwaukee County records and making them available to the community. However, we know we are at a significant point where how we do this, with both past and future documents, must be addressed. Documents are created every day at the County and so MCHS only takes on more records each year. It is important that the County and MCHS work together to ensure records are properly retained and that this relationship can be supported appropriately.

As MCHS uses our County contribution for the Research Library operations, we view the contribution as support for record retention vs. a cultural contribution. When the County keeps records for the required number of years, these are stored at a private facility and the provider is paid for these services in full. Each year, costs increase, and the County willingly pays the provider. Yet, MCHS takes on more documents each year and these are never discarded like those with the private provider after the County no longer needs to retain them. Therefore, MCHS only needs

## **CULTURAL CONTRIBUTIONS (1900) BUDGET**

Department: **Cultural Contributions**

UNIT NO. **1900**

FUND: **General — 0001**

more space over time and more resources to store the records and make them available. As an example, the records we store have increased by more than 1,000 cubic feet in just the last seven years, but our County contribution has not. (Note: While MCHS has received a \$54,000 increase for the past five years, this is part of a 50-year lease agreement where MCHS takes on all maintenance of the MCHS building. This extra amount ends this year). In fact, it the amount was cut once within that time and no increase for inflation is made.

MCHS proposes that the County provides an additional \$100,000 for 2022 to MCHS that are earmarked for these efforts. These funds would be used to support capacity, educational resources, and expertise to begin the planning process with the County for how to properly retain and store digital records. With a plan, MCHS will be able to work with the County to implement and to ensure that processes and resources exist to support proper digital record retention. The staff at MCHS knows that to best serve our community, Milwaukee County residents both present and future, we need to address this issue. Time is of the essence and the support of the County both financially, and in working with MCHS to properly retain Milwaukee County records is imperative..