ARIZONA HISTORICAL SOCIETY

FLAGSTAFF | TEMPE | TUCSON | YUMA

The Honorable Douglas A. Ducey
Governor of Arizona
1700 West Washington Street
Phoenix, Arizona 85007

September 1, 2022

Dear Governor Ducey,

On behalf of its Board of Directors, the Arizona Historical Society (AHS) is pleased to submit its Fiscal Year (FY) 2024 Budget Request for your consideration. The Society has also submitted its current 2019-2024 Strategic Plan, which is otherwise in the process of being updated. AHS has also included its 2013 Sunset Review and budget narrative for FY24. This latter document describes all adjustments and changes made between FY23 and FY24, and incorporates your 10% staffing salary increase from July 2022.

In accordance with Arizona Revised Statutes Title 35, Article 2, Section 113:

> The administrative head of each budget unit, not later than September 1 of each year or at a later date not to exceed thirty days after September 1 if approved by the director of the governor's office of strategic planning and budgeting, shall submit to the governor, with two copies, estimates of the financial requirements and of receipts, including appropriated and non-appropriated monies in no less detail than the state general fund, of the budget unit for the next fiscal year. The estimates shall include a detailed estimate of the cost to the budget unit in the next fiscal year attributable to a county's, city's or town's establishment of a minimum wage if that minimum wage exceeds the minimum wage established by this state pursuant to section 23-363. The estimates shall be on the forms and in the manner prescribed by the governor with explanatory data that may be required, together with additional information the head of the budget unit desires to submit. The estimates submitted shall bear the approval of the administrative head of the budget unit.

The mission of the Arizona Historical Society is to connect people through the power of Arizona history. In our duty, we steward the material artifacts and archives that embody the history of the state since before and after its statehood. AHS stewards over 82,000 artifacts and 4,500 archives materials (12,000 linear feet) from across this period, and continues to actively collect significant items which reflect the history currently being written. Our programs, resources, and expertise are shared and enjoyed by students, researchers, residents, and tourists from across the state. Our four museums – in Tempe, Tucson, Yuma, and Flagstaff – serve a diverse majority of the state's population, exciting others in the legacy of the state's past through rotating exhibits, guest speakers, journal publications, and community events. AHS works with a variety of local and regional partners to support these operations, as well as our continued preservation efforts in the care of some of the state's oldest historic homes.

At AHS, we connect the past with the present. Visitors experience a living past, exploring how the legacy of the past shapes our world today and the capacity of all Arizonans to guide its future impact. Established November 7, 1864 by the First Territorial Legislature, the Arizona Historical Society is the oldest historical society serving the people of

Arizona today. Both in response to our 2013 Sunset Audit and the practicalities inspired by changing markets after the 2020 pandemic, AHS has tailored itself to be an agile and adaptive state agency. In fall 2021, AHS hired its new Executive Director, who has inspired and further aligned our efforts with state systems and expectations. The agency is actively engaging with community partners, making a concentrated effort to better establish itself as a trusted and valued resource for schools, families, businesses, and tourists. The response has been significant, with a quadrupling of attendance from last year's numbers and active sponsorship of our exhibits and events, though this is still less than half of our pre-pandemic visitation and accomplished with an average of nearly $100,000 in lost Enterprise funds per annum since 2020. AHS' recovery is on-track with national trends within the industry and, in some cases, exceeds projections.[1] Budget deficits were temporarily addressed in 2020 and 2021 through the award of several Federal relief programs, most notably PPP and SVOG funds, but these funding opportunities have since ceased.

Looking ahead to Fiscal Year 2024, AHS continues to face a number of unique challenges. To-date, AHS has successfully navigated and resolved the recommendations provided by the 2013 Sunset Review. Strategies are underway to develop long-term and sustainable sources of non-appropriated funding through a Capital Campaign, while deficiencies in the likes of our exhibit refreshes, facilities care, staff retention and hiring, and historic house maintenance are being given greater attention and care through our in-development Interim Strategic Plan for FY19-24 and through the creation of new, restricted funding accounts. However, each of these initiatives is in its nascent stage and will require several years of supplemental state support before achieving financial independence to reach a sustainable level.

These needs – both in their immediate need and forthcoming resolution – are described in the attached "Budget Narrative" for your consideration.

Thank you for your support, and for the continued opportunity to serve the people of Arizona and their legacy.

Sincerely,

David Breeckner

Dr. David J. Breeckner
Executive Director

[1]American Alliance of Museums (AAM). *National Museums Survey from December 8, 2021 to January 20, 2022*, 2-28-22 https://www.aam-us.org/2022/02/08/national-snapshot-of-covid-19-impact-on-united-states-museums-fielded-december-2021-january-2022

State of Arizona Budget Request

State Agency

Arizona Historical Society

A.R.S. Citation: **35-113**

Governor DUCEY:

This and the accompanying budget schedules, statements and explanatory information constitute the operating budget request for this agency for Fiscal Year 2024.

To the best of my knowledge all statements and explanations contained in the estimates submitted are true and correct.

Agency Head: **Dr. David Breeckner**

Title: **Executive Director**

Dr. David Breeckner 9/1/2022

(signature)

Phone: **(520) 617-1164**

Prepared By: **Carole McQueen**

Email Address: **cmcqueen@azhs.gov**

Date Prepared: **Thursday, September 1, 2022**

Appropriated Funds

	FY 2023 Approp	FY 2024 Fund. Issue	FY 2024 Total Budget
Total Amount Requested:	3,214.7	0.0	3,214.7
General Fund	3,214.7	0.0	3,214.7

Non-Appropriated Funds

	FY 2023 Expd. Plan	FY 2024 Fund. Issue	FY 2024 Total Budget
Total Amount Planned:	1,344.0	0.0	1,518.2
Federal Grants Fund	30.0	0.0	30.0
Donations Fund	651.4	0.0	825.6
Historical Society Preservation/Restoration Fund	23.0	0.0	23.0
Permanent AZ Historical Society Revolving Fund	639.6	0.0	639.6
Total:	4,558.7	0.0	4,732.9

Revenue Schedule

Agency: Arizona Historical Society

Fund: AA1000 General Fund

AFIS Code	Category of Receipt and Description	FY 2022	FY 2023	FY 2024
4155	URBAN REVENUE SHARING DISTRIBUTIONS	0.0	0.0	0.0
	Fund Total:	0.0	0.0	0.0

Revenue Schedule

Agency: Arizona Historical Society

Fund: HI2000 Federal Grants Fund

AFIS Code	Category of Receipt and Description	FY 2022	FY 2023	FY 2024
4211	FEDERAL GRANTS	690.3	50.0	50.0
	Fund Total:	690.3	50.0	50.0

Revenue Schedule

Agency: Arizona Historical Society

Fund: HI2025 Donations Fund

AFIS Code	Category of Receipt and Description	FY 2022	FY 2023	FY 2024
4231	STATE AND LOCAL GOVT GRANTS - OPERATING	22.0	35.0	35.0
4339	OTHER FEES AND CHARGES FOR SERVICES	75.8	97.2	97.2
4372	PUBLICATIONS AND REPRODUCTIONS	21.5	20.0	20.0
4379	OTHER CHARGES FOR GOODS	1.0	0.5	0.5
4449	OTHER FEES	68.0	81.0	81.0
4611	UNRESTRICTED DONATIONS	138.7	61.2	61.2
4612	RESTRICTED DONATIONS	5.8	100.0	100.0
4616	PRIVATE GRANTS	8.5	0.0	0.0
4631	TREASURERS INTEREST INCOME	5.3	2.1	2.1
4799	MISCELLANEOUS RECEIPTS	1.4	11.5	11.5
4901	OPERATING TRANSFERS IN	0.0	0.0	0.0
	Fund Total:	348.0	408.5	408.5

Revenue Schedule

Agency: Arizona Historical Society

Fund: HI2026 Non Expendable Trust Fund

AFIS Code	Category of Receipt and Description	FY 2022	FY 2023	FY 2024
4631	TREASURERS INTEREST INCOME	0.3	0.4	0.4
	Fund Total:	0.3	0.4	0.4

Revenue Schedule

Agency: Arizona Historical Society

Fund: HI2125 Historical Society Preservation/Restoration Fund

AFIS Code	Category of Receipt and Description	FY 2022	FY 2023	FY 2024
4372	PUBLICATIONS AND REPRODUCTIONS	30.5	40.8	40.8
4611	UNRESTRICTED DONATIONS	0.1	0.5	0.5
	Fund Total:	30.6	41.3	41.3

Revenue Schedule

Agency: Arizona Historical Society

Fund: HI2900 Permanent AZ Historical Society Revolving Fund

AFIS Code	Category of Receipt and Description	FY 2022	FY 2023	FY 2024
4320	ADMISSION AND ENTRY FEES	88.5	120.1	120.1
4372	PUBLICATIONS AND REPRODUCTIONS	32.3	20.0	20.0
4379	OTHER CHARGES FOR GOODS	30.5	53.6	53.6
4611	UNRESTRICTED DONATIONS	0.5	0.0	0.0
4612	RESTRICTED DONATIONS	1.2	0.0	0.0
4631	TREASURERS INTEREST INCOME	1.7	0.0	0.0
4632	RENTAL INCOME	291.7	330.0	330.0
4901	OPERATING TRANSFERS IN	13.2	0.0	0.0
	Fund Total:	459.6	523.7	523.7

Sources and Uses of Funds

Agency: Arizona Historical Society

Fund: HI2000 Federal Grants Fund

Cash Flow Summary	Actual FY 2022	Estimate FY 2023	Estimate FY 2024
Balance Forward from Prior Year	9.6	31.0	51.0
Revenue (From Revenue Schedule)	690.3	50.0	50.0
Total Available	699.9	81.0	101.0
Total Appropriated Disbursements	0.0	0.0	0.0
Total Non-Appropriated Disbursements	668.9	30.0	30.0
Balance Forward to Next Year	31.0	51.0	71.0

Non-Appropriated Expenditure

Expenditure Categories	Actual FY 2022	Estimate FY 2023	Estimate FY 2024
Personal Services	477.1	0.0	0.0
Employee Related Expenses	190.2	0.0	0.0
Prof. And Outside Services	1.3	15.0	15.0
Travel - In State	0.0	0.0	0.0
Travel - Out of State	0.0	0.0	0.0
Food	0.0	0.0	0.0
Aid to Organizations and Individuals	0.0	0.0	0.0
Other Operating Expenses	0.3	15.0	15.0
Equipment	0.0	0.0	0.0
Capital Outlay	0.0	0.0	0.0
Debt Service	0.0	0.0	0.0
Cost Allocation	0.0	0.0	0.0
Transfers	0.0	0.0	0.0
Expenditure Categories Total:	668.9	30.0	30.0
Cap Transfer due to Fund Balance	0.0	0.0	0.0
Residual Equity Transfer	0.0	0.0	0.0
Prior Commitments or Obligated Expenditures	0.0	0.0	0.0
Non Appropriated 27th Pay Roll	0.0	0.0	0.0
Non-Appropriated Expenditure Total:	668.9	30.0	30.0
Non-Apppropriated FTE:	16.5	0.0	0.0

Fund Description

OSPB: Revenue from federal grants to be used as specified in the grant.

Sources and Uses of Funds

Agency: Arizona Historical Society

Fund: HI2025 Donations Fund

Cash Flow Summary	Actual FY 2022	Estimate FY 2023	Estimate FY 2024
Balance Forward from Prior Year	3,132.5	3,294.7	3,051.8
Revenue (From Revenue Schedule)	348.0	408.5	408.5
Total Available	3,480.5	3,703.2	3,460.3
Total Appropriated Disbursements	0.0	0.0	0.0
Total Non-Appropriated Disbursements	185.8	651.4	825.6
Balance Forward to Next Year	3,294.7	3,051.8	2,634.7

Non-Appropriated Expenditure

Expenditure Categories	Actual FY 2022	Estimate FY 2023	Estimate FY 2024
Personal Services	9.6	87.4	261.6
Employee Related Expenses	4.6	35.0	35.0
Prof. And Outside Services	100.9	30.5	30.5
Travel - In State	1.1	0.0	0.0
Travel - Out of State	0.0	0.0	0.0
Food	0.0	0.0	0.0
Aid to Organizations and Individuals	3.0	4.0	4.0
Other Operating Expenses	48.5	488.5	488.5
Equipment	4.9	6.0	6.0
Capital Outlay	0.0	0.0	0.0
Debt Service	0.0	0.0	0.0
Cost Allocation	0.0	0.0	0.0
Transfers	13.2	0.0	0.0
Expenditure Categories Total:	185.8	651.4	825.6
Cap Transfer due to Fund Balance	0.0	0.0	0.0
Residual Equity Transfer	0.0	0.0	0.0
Prior Commitments or Obligated Expenditures	0.0	0.0	0.0
Non Appropriated 27th Pay Roll	0.0	0.0	0.0
Non-Appropriated Expenditure Total:	185.8	651.4	825.6
Non-Apppropriated FTE:	0.0	1.0	1.0

Fund Description

OSPB: Statewide donations are received from membership dues, private donations and grants, donation box revenue, education tours and special program events. Statewide donations cover operating expenses, cost of printing the Journal of Arizona History four times per year, salary & ERE of staff not paid through appropriated dollars or earned income, programming expenses, exhibit production costs, repairs and travel cost.

Sources and Uses of Funds

Agency: Arizona Historical Society

Fund: HI2026 Non Expendable Trust Fund

Cash Flow Summary	Actual FY 2022	Estimate FY 2023	Estimate FY 2024
Balance Forward from Prior Year	147.2	147.5	147.9
Revenue (From Revenue Schedule)	0.3	0.4	0.4
Total Available	147.5	147.9	148.3
Total Appropriated Disbursements	0.0	0.0	0.0
Total Non-Appropriated Disbursements	0.0	0.0	0.0
Balance Forward to Next Year	147.5	147.9	148.3

Non-Appropriated Expenditure

Expenditure Categories	Actual FY 2022	Estimate FY 2023	Estimate FY 2024
Personal Services	0.0	0.0	0.0
Employee Related Expenses	0.0	0.0	0.0
Prof. And Outside Services	0.0	0.0	0.0
Travel - In State	0.0	0.0	0.0
Travel - Out of State	0.0	0.0	0.0
Food	0.0	0.0	0.0
Aid to Organizations and Individuals	0.0	0.0	0.0
Other Operating Expenses	0.0	0.0	0.0
Equipment	0.0	0.0	0.0
Capital Outlay	0.0	0.0	0.0
Debt Service	0.0	0.0	0.0
Cost Allocation	0.0	0.0	0.0
Transfers	0.0	0.0	0.0
Expenditure Categories Total:	0.0	0.0	0.0
Cap Transfer due to Fund Balance	0.0	0.0	0.0
Residual Equity Transfer	0.0	0.0	0.0
Prior Commitments or Obligated Expenditures	0.0	0.0	0.0
Non Appropriated 27th Pay Roll	0.0	0.0	0.0
Non-Appropriated Expenditure Total:	0.0	0.0	0.0
Non-Apppropriated FTE:	0.0	0.0	0.0

Fund Description

OSPB: This trust fund holds donations limited by specific donor intent. The use of these funds is restricted based on the donor's intent, including the use of the fund balance. Only the interest earned by the fund each year can be expended, per donor restrictions.

Sources and Uses of Funds

Agency: Arizona Historical Society

Fund: HI2125 Historical Society Preservation/Restoration Fund

Cash Flow Summary	Actual FY 2022	Estimate FY 2023	Estimate FY 2024
Balance Forward from Prior Year	49.9	73.9	92.2
Revenue (From Revenue Schedule)	30.6	41.3	41.3
Total Available	80.5	115.2	133.5
Total Appropriated Disbursements	0.0	0.0	0.0
Total Non-Appropriated Disbursements	6.6	23.0	23.0
Balance Forward to Next Year	73.9	92.2	110.5

Non-Appropriated Expenditure

Expenditure Categories	Actual FY 2022	Estimate FY 2023	Estimate FY 2024
Personal Services	0.0	0.0	0.0
Employee Related Expenses	0.0	0.0	0.0
Prof. And Outside Services	0.0	0.0	0.0
Travel - In State	0.0	0.0	0.0
Travel - Out of State	0.0	0.0	0.0
Food	0.0	0.0	0.0
Aid to Organizations and Individuals	0.0	0.0	0.0
Other Operating Expenses	6.6	23.0	23.0
Equipment	0.0	0.0	0.0
Capital Outlay	0.0	0.0	0.0
Debt Service	0.0	0.0	0.0
Cost Allocation	0.0	0.0	0.0
Transfers	0.0	0.0	0.0
Expenditure Categories Total:	6.6	23.0	23.0
Cap Transfer due to Fund Balance	0.0	0.0	0.0
Residual Equity Transfer	0.0	0.0	0.0
Prior Commitments or Obligated Expenditures	0.0	0.0	0.0
Non Appropriated 27th Pay Roll	0.0	0.0	0.0
Non-Appropriated Expenditure Total:	6.6	23.0	23.0
Non-Apppropriated FTE:	0.0	0.0	0.0

Fund Description

OSPB: Monies are received for research and photo requests provided by the museum's library staff. Funds are used for copying, preserving, and restoring historic photographs and negatives.

Sources and Uses of Funds

Agency: Arizona Historical Society

Fund: HI2900 Permanent AZ Historical Society Revolving Fund

Cash Flow Summary	Actual FY 2022	Estimate FY 2023	Estimate FY 2024
Balance Forward from Prior Year	401.9	739.3	623.4
Revenue (From Revenue Schedule)	459.6	523.7	523.7
Total Available	861.5	1,263.0	1,147.1
Total Appropriated Disbursements	0.0	0.0	0.0
Total Non-Appropriated Disbursements	122.2	639.6	639.6
Balance Forward to Next Year	739.3	623.4	507.5

Non-Appropriated Expenditure

Expenditure Categories	Actual FY 2022	Estimate FY 2023	Estimate FY 2024
Personal Services	5.4	337.7	337.7
Employee Related Expenses	2.5	123.1	123.1
Prof. And Outside Services	16.9	30.0	30.0
Travel - In State	0.3	0.0	0.0
Travel - Out of State	0.0	0.0	0.0
Food	0.0	0.0	0.0
Aid to Organizations and Individuals	0.0	0.0	0.0
Other Operating Expenses	94.1	148.8	148.8
Equipment	3.0	0.0	0.0
Capital Outlay	0.0	0.0	0.0
Debt Service	0.0	0.0	0.0
Cost Allocation	0.0	0.0	0.0
Transfers	0.0	0.0	0.0
Expenditure Categories Total:	122.2	639.6	639.6
Cap Transfer due to Fund Balance	0.0	0.0	0.0
Residual Equity Transfer	0.0	0.0	0.0
Prior Commitments or Obligated Expenditures	0.0	0.0	0.0
Non Appropriated 27th Pay Roll	0.0	0.0	0.0
Non-Appropriated Expenditure Total:	122.2	639.6	639.6
Non-Apppropriated FTE:	5.0	13.5	13.5

Fund Description

OSPB: The fund consists of all monies received by the society from the operation of gift shops, book shops, food service facilities, and charges for the use of or admission into any of the society's facilities. Facility rental funds are used for staffing, repairs and maintenance for the Museums.

Sources and Uses of Funds

Agency: Arizona Historical Society

Fund: HI3240 Crisis Contingency and Safety Net fund

Cash Flow Summary	Actual FY 2022	Estimate FY 2023	Estimate FY 2024
Balance Forward from Prior Year	0.0	0.0	0.0
Total Available	0.0	0.0	0.0
Total Appropriated Disbursements	0.0	0.0	0.0
Total Non-Appropriated Disbursements	0.0	0.0	0.0
Balance Forward to Next Year	0.0	0.0	0.0

Non-Appropriated Expenditure

Expenditure Categories	Actual FY 2022	Estimate FY 2023	Estimate FY 2024
Personal Services	0.0	0.0	0.0
Employee Related Expenses	0.0	0.0	0.0
Prof. And Outside Services	0.0	0.0	0.0
Travel - In State	0.0	0.0	0.0
Travel - Out of State	0.0	0.0	0.0
Food	0.0	0.0	0.0
Aid to Organizations and Individuals	0.0	0.0	0.0
Other Operating Expenses	0.0	0.0	0.0
Equipment	0.0	0.0	0.0
Capital Outlay	0.0	0.0	0.0
Debt Service	0.0	0.0	0.0
Cost Allocation	0.0	0.0	0.0
Transfers	0.0	0.0	0.0
Expenditure Categories Total:	0.0	0.0	0.0
Cap Transfer due to Fund Balance	0.0	0.0	0.0
Residual Equity Transfer	0.0	0.0	0.0
Prior Commitments or Obligated Expenditures	0.0	0.0	0.0
Non Appropriated 27th Pay Roll	0.0	0.0	0.0
Non-Appropriated Expenditure Total:	0.0	0.0	0.0
Non-Apppropriated FTE:	0.0	0.0	0.0

Fund Description

OSPB:

Funding Issues List

Agency: **Arizona Historical Society**

FY 2024

Priority	Funding Issue Title	Total FTE	Total Amount	General Fund	Other Aprop. Funds	Non-App Funds
1	Increase Appropriations for Operational Deficienci	0.0	0.0	0.0	0.0	0.0
1			0.0	0.0	0.0	0.0
1		0.0	0.0	0.0	0.0	0.0
	Total:	0.0	0.0	0.0	0.0	0.0
	Decision Package Total:	0.0	0.0	0.0	0.0	0.0

Summary of Expenditure and Budget Request for Selected Funds

Agency: Arizona Historical Society

Fund: AA1000 General Fund (Appropriated)

	FY 2022 Actual	FY 2023 Expd. Plan	FY 2024 Fund. Issue	FY 2024 Total Request
Cost Center/Program:				
1 Arizona Historical Society	2,867.6	3,214.7	0.0	3,214.7
	2,867.6	3,214.7	0.0	3,214.7
Expenditure Categories				
FTE	27.5	34.5	0.0	34.5
Personal Services	1,208.9	1,872.0	0.0	1,872.0
Employee Related Expenses	473.9	825.9	0.0	825.9
Professional and Outside Services	51.9	40.0	0.0	40.0
Travel In-State	16.5	17.3	0.0	17.3
Travel Out of State	0.3	6.5	0.0	6.5
Food	0.0	0.0	0.0	0.0
Aid to Organizations and Individuals	41.7	41.7	0.0	41.7
Other Operating Expenses	1,072.6	407.1	0.0	407.1
Equipment	1.8	4.2	0.0	4.2
Capital Outlay	0.0	0.0	0.0	0.0
Debt Service	0.0	0.0	0.0	0.0
Cost Allocation	0.0	0.0	0.0	0.0
Transfers	0.0	0.0	0.0	0.0
Expenditure Categories Total:	2,867.6	3,214.7	0.0	3,214.7
Fund Total:	2,867.6	3,214.7	0.0	3,214.7

Summary of Expenditure and Budget Request for Selected Funds

Agency: Arizona Historical Society

Fund: HI2000 Federal Grants Fund (Non-Appropriated)

	FY 2022 Actual	FY 2023 Expd. Plan	FY 2024 Fund. Issue	FY 2024 Total Request
Cost Center/Program:				
1 Arizona Historical Society	668.9	30.0	0.0	30.0
	668.9	30.0	0.0	30.0
Expenditure Categories				
FTE	16.5	0.0	0.0	0.0
Personal Services	477.1	0.0	0.0	0.0
Employee Related Expenses	190.2	0.0	0.0	0.0
Professional and Outside Services	1.3	15.0	0.0	15.0
Travel In-State	0.0	0.0	0.0	0.0
Travel Out of State	0.0	0.0	0.0	0.0
Food	0.0	0.0	0.0	0.0
Aid to Organizations and Individuals	0.0	0.0	0.0	0.0
Other Operating Expenses	0.3	15.0	0.0	15.0
Equipment	0.0	0.0	0.0	0.0
Capital Outlay	0.0	0.0	0.0	0.0
Debt Service	0.0	0.0	0.0	0.0
Cost Allocation	0.0	0.0	0.0	0.0
Transfers	0.0	0.0	0.0	0.0
Expenditure Categories Total:	668.9	30.0	0.0	30.0
Fund Total:	668.9	30.0	0.0	30.0

Summary of Expenditure and Budget Request for Selected Funds

Agency: Arizona Historical Society

Fund: HI2025 Donations Fund (Non-Appropriated)

	FY 2022 Actual	FY 2023 Expd. Plan	FY 2024 Fund. Issue	FY 2024 Total Request
Cost Center/Program:				
1 Arizona Historical Society	185.8	651.4	0.0	825.6
	185.8	651.4	0.0	825.6
Expenditure Categories				
FTE	0.0	1.0	0.0	1.0
Personal Services	9.6	87.4	0.0	261.6
Employee Related Expenses	4.6	35.0	0.0	35.0
Professional and Outside Services	100.9	30.5	0.0	30.5
Travel In-State	1.1	0.0	0.0	0.0
Travel Out of State	0.0	0.0	0.0	0.0
Food	0.0	0.0	0.0	0.0
Aid to Organizations and Individuals	3.0	4.0	0.0	4.0
Other Operating Expenses	48.5	488.5	0.0	488.5
Equipment	4.9	6.0	0.0	6.0
Capital Outlay	0.0	0.0	0.0	0.0
Debt Service	0.0	0.0	0.0	0.0
Cost Allocation	0.0	0.0	0.0	0.0
Transfers	13.2	0.0	0.0	0.0
Expenditure Categories Total:	185.8	651.4	0.0	825.6
Fund Total:	185.8	651.4	0.0	825.6

Summary of Expenditure and Budget Request for Selected Funds

Agency: Arizona Historical Society

Fund: HI2125 Historical Society Preservation/Restoration Fund (Non-Appropriated)

	FY 2022 Actual	FY 2023 Expd. Plan	FY 2024 Fund. Issue	FY 2024 Total Request
Cost Center/Program:				
1 Arizona Historical Society	6.6	23.0	0.0	23.0
	6.6	23.0	0.0	23.0
Expenditure Categories				
Personal Services	0.0	0.0	0.0	0.0
Employee Related Expenses	0.0	0.0	0.0	0.0
Professional and Outside Services	0.0	0.0	0.0	0.0
Travel In-State	0.0	0.0	0.0	0.0
Travel Out of State	0.0	0.0	0.0	0.0
Food	0.0	0.0	0.0	0.0
Aid to Organizations and Individuals	0.0	0.0	0.0	0.0
Other Operating Expenses	6.6	23.0	0.0	23.0
Equipment	0.0	0.0	0.0	0.0
Capital Outlay	0.0	0.0	0.0	0.0
Debt Service	0.0	0.0	0.0	0.0
Cost Allocation	0.0	0.0	0.0	0.0
Transfers	0.0	0.0	0.0	0.0
Expenditure Categories Total:	6.6	23.0	0.0	23.0
Fund Total:	6.6	23.0	0.0	23.0

Summary of Expenditure and Budget Request for Selected Funds

Agency: Arizona Historical Society

Fund: HI2900 Permanent AZ Historical Society Revolving Fund (Non-Appropriated)

	FY 2022 Actual	FY 2023 Expd. Plan	FY 2024 Fund. Issue	FY 2024 Total Request
Cost Center/Program:				
1 Arizona Historical Society	122.2	639.6	0.0	639.6
	122.2	639.6	0.0	639.6
Expenditure Categories				
FTE	5.0	13.5	0.0	13.5
Personal Services	5.4	337.7	0.0	337.7
Employee Related Expenses	2.5	123.1	0.0	123.1
Professional and Outside Services	16.9	30.0	0.0	30.0
Travel In-State	0.3	0.0	0.0	0.0
Travel Out of State	0.0	0.0	0.0	0.0
Food	0.0	0.0	0.0	0.0
Aid to Organizations and Individuals	0.0	0.0	0.0	0.0
Other Operating Expenses	94.1	148.8	0.0	148.8
Equipment	3.0	0.0	0.0	0.0
Capital Outlay	0.0	0.0	0.0	0.0
Debt Service	0.0	0.0	0.0	0.0
Cost Allocation	0.0	0.0	0.0	0.0
Transfers	0.0	0.0	0.0	0.0
Expenditure Categories Total:	122.2	639.6	0.0	639.6
Fund Total:	122.2	639.6	0.0	639.6

Summary of Expenditure and Budget Request for Selected Funds

Agency: Arizona Historical Society

Fund: HI2900 Permanent AZ Historical Society Revolving Fund (Non-Appropriated)

	FY 2022 Actual	FY 2023 Expd. Plan	FY 2024 Fund. Issue	FY 2024 Total Request
Agency Total for Selected Funds	3,851.1	4,558.7	0.0	4,732.9

Summary of Expenditure and Budget Request for All Funds

Agency: Arizona Historical Society

Appropriated

		FY 2022 Actual	FY 2023 Expd. Plan	FY 2024 Fund. Issue	FY 2024 Total Request
Cost Center/Program:					
1	Arizona Historical Society	2,867.6	3,371.8	0.0	3,371.8
		2,867.6	3,371.8	0.0	3,371.8
Expenditure Categories					
	FTE	27.5	68.5	0.0	68.5
	Personal Services	1,208.9	2,028.6	0.0	2,028.6
	Employee Related Expenses	473.9	868.0	0.0	868.0
	Professional and Outside Services	51.9	40.0	0.0	40.0
	Travel In-State	16.5	17.3	0.0	17.3
	Travel Out of State	0.3	0.0	0.0	0.0
	Food	0.0	0.0	0.0	0.0
	Aid to Organizations and Individuals	41.7	41.7	0.0	41.7
	Other Operating Expenses	1,072.6	376.2	0.0	376.2
	Equipment	1.8	0.0	0.0	0.0
	Capital Outlay	0.0	0.0	0.0	0.0
	Debt Service	0.0	0.0	0.0	0.0
	Cost Allocation	0.0	0.0	0.0	0.0
	Transfers	0.0	0.0	0.0	0.0
Expenditure Categories Total:		2,867.6	3,371.8	0.0	3,371.8

Summary of Expenditure and Budget Request for All Funds

Agency: Arizona Historical Society

Non-Appropriated

		FY 2022 Actual	FY 2023 Expd. Plan	FY 2024 Fund. Issue	FY 2024 Total Request
Cost Center/Program:					
1	Arizona Historical Society	983.5	1,344.0	0.0	1,518.2
		983.5	1,344.0	0.0	1,518.2
Expenditure Categories					
	FTE	21.5	14.5	0.0	14.5
	Personal Services	492.1	425.1	0.0	599.3
	Employee Related Expenses	197.3	158.1	0.0	158.1
	Professional and Outside Services	119.1	75.5	0.0	75.5
	Travel In-State	1.4	0.0	0.0	0.0
	Travel Out of State	0.0	0.0	0.0	0.0
	Food	0.0	0.0	0.0	0.0
	Aid to Organizations and Individuals	3.0	4.0	0.0	4.0
	Other Operating Expenses	149.5	675.3	0.0	675.3
	Equipment	7.9	6.0	0.0	6.0
	Capital Outlay	0.0	0.0	0.0	0.0
	Debt Service	0.0	0.0	0.0	0.0
	Cost Allocation	0.0	0.0	0.0	0.0
	Transfers	13.2	0.0	0.0	0.0
Expenditure Categories Total:		983.5	1,344.0	0.0	1,518.2

Summary of Expenditure and Budget Request for All Funds

Agency: **Arizona Historical Society**

Agency Total for All Funds:	3,851.1	4,715.8	0.0	4,890.0			

Program Group Summary of Expenditures and Budget Request for Selected Funds

Agency: Arizona Historical Society

Program: Arizona Historical Society

Fund: AA1000-A General Fund (Appropriated)

		FY 2022 Actual	FY 2023 Expd. Plan	FY 2024 Fund. Issue	FY 2024 Total Request
Program Expenditures					
COST CENTER/PROGRAM BUDGET UNIT					
1-1	Arizona Historical Society	2,334.4	2,427.6	0.0	2,427.6
1-2	SLI Field Services and Grants	59.7	63.8	0.0	63.8
1-3	SLI Papago Park Museum	473.5	723.3	0.0	723.3
1-4	SLI FY 2023 Salary Increase	0.0	0.0	0.0	0.0
	Total	2,867.6	3,214.7	0.0	3,214.7
Appropriated Funding					
Expenditure Categories					
FTE Positions		27.5	34.5	0.0	34.5
Personal Services		1,208.9	1,872.0	0.0	1,872.0
Employee Related Expenses		473.9	825.9	0.0	825.9
Professional and Outside Services		51.9	40.0	0.0	40.0
Travel In-State		16.5	17.3	0.0	17.3
Travel Out of State		0.3	6.5	0.0	6.5
Food		0.0	0.0	0.0	0.0
Aid to Organizations and Individuals		41.7	41.7	0.0	41.7
Other Operating Expenses		1,072.6	407.1	0.0	407.1
Equipment		1.8	4.2	0.0	4.2
Capital Outlay		0.0	0.0	0.0	0.0
Debt Service		0.0	0.0	0.0	0.0
Cost Allocation		0.0	0.0	0.0	0.0
Transfers		0.0	0.0	0.0	0.0
Expenditure Categories Total:		2,867.6	3,214.7	0.0	3,214.7
Fund AA1000-A Total:		2,867.6	3,214.7	0.0	3,214.7

Program Group Summary of Expenditures and Budget Request for Selected Funds

Agency: Arizona Historical Society

Program: Arizona Historical Society

		FY 2022 Actual	FY 2023 Expd. Plan	FY 2024 Fund. Issue	FY 2024 Total Request
Fund:	**HI2000-N Federal Grants Fund (Non-Appropriated)**				
Program Expenditures					
COST CENTER/PROGRAM BUDGET UNIT					
1-1	Arizona Historical Society	668.9	30.0	0.0	30.0
	Total	668.9	30.0	0.0	30.0
Non-Appropriated Funding					
Expenditure Categories					
FTE Positions		16.5	0.0	0.0	0.0
Personal Services		477.1	0.0	0.0	0.0
Employee Related Expenses		190.2	0.0	0.0	0.0
Professional and Outside Services		1.3	15.0	0.0	15.0
Travel In-State		0.0	0.0	0.0	0.0
Travel Out of State		0.0	0.0	0.0	0.0
Food		0.0	0.0	0.0	0.0
Aid to Organizations and Individuals		0.0	0.0	0.0	0.0
Other Operating Expenses		0.3	15.0	0.0	15.0
Equipment		0.0	0.0	0.0	0.0
Capital Outlay		0.0	0.0	0.0	0.0
Debt Service		0.0	0.0	0.0	0.0
Cost Allocation		0.0	0.0	0.0	0.0
Transfers		0.0	0.0	0.0	0.0
Expenditure Categories Total:		668.9	30.0	0.0	30.0
Fund HI2000-N Total:		668.9	30.0	0.0	30.0

Program Group Summary of Expenditures and Budget Request for Selected Funds

Agency: Arizona Historical Society

Program: Arizona Historical Society

Fund: HI2025-N Donations Fund (Non-Appropriated)

		FY 2022 Actual	FY 2023 Expd. Plan	FY 2024 Fund. Issue	FY 2024 Total Request
Program Expenditures					
COST CENTER/PROGRAM BUDGET UNIT					
1-1	Arizona Historical Society	182.5	402.9	0.0	577.1
1-2	SLI Field Services and Grants	3.0	5.0	0.0	5.0
1-3	SLI Papago Park Museum	0.3	243.5	0.0	243.5
	Total	185.8	651.4	0.0	825.6
Non-Appropriated Funding					
Expenditure Categories					
FTE Positions		0.0	1.0	0.0	1.0
Personal Services		9.6	87.4	0.0	261.6
Employee Related Expenses		4.6	35.0	0.0	35.0
Professional and Outside Services		100.9	30.5	0.0	30.5
Travel In-State		1.1	0.0	0.0	0.0
Travel Out of State		0.0	0.0	0.0	0.0
Food		0.0	0.0	0.0	0.0
Aid to Organizations and Individuals		3.0	4.0	0.0	4.0
Other Operating Expenses		48.5	488.5	0.0	488.5
Equipment		4.9	6.0	0.0	6.0
Capital Outlay		0.0	0.0	0.0	0.0
Debt Service		0.0	0.0	0.0	0.0
Cost Allocation		0.0	0.0	0.0	0.0
Transfers		13.2	0.0	0.0	0.0
Expenditure Categories Total:		185.8	651.4	0.0	825.6
Fund HI2025-N Total:		185.8	651.4	0.0	825.6

Program Group Summary of Expenditures and Budget Request for Selected Funds

Agency: Arizona Historical Society

Program: Arizona Historical Society

Fund: HI2125-N Historical Society Preservation/Restoration Fund (Non-Appropriated)

		FY 2022 Actual	FY 2023 Expd. Plan	FY 2024 Fund. Issue	FY 2024 Total Request
Program Expenditures					
COST CENTER/PROGRAM BUDGET UNIT					
1-1 Arizona Historical Society		6.6	23.0	0.0	23.0
	Total	6.6	23.0	0.0	23.0
Non-Appropriated Funding					
Expenditure Categories					
Personal Services		0.0	0.0	0.0	0.0
Employee Related Expenses		0.0	0.0	0.0	0.0
Professional and Outside Services		0.0	0.0	0.0	0.0
Travel In-State		0.0	0.0	0.0	0.0
Travel Out of State		0.0	0.0	0.0	0.0
Food		0.0	0.0	0.0	0.0
Aid to Organizations and Individuals		0.0	0.0	0.0	0.0
Other Operating Expenses		6.6	23.0	0.0	23.0
Equipment		0.0	0.0	0.0	0.0
Capital Outlay		0.0	0.0	0.0	0.0
Debt Service		0.0	0.0	0.0	0.0
Cost Allocation		0.0	0.0	0.0	0.0
Transfers		0.0	0.0	0.0	0.0
Expenditure Categories Total:		6.6	23.0	0.0	23.0
Fund HI2125-N Total:		6.6	23.0	0.0	23.0

Program Group Summary of Expenditures and Budget Request for Selected Funds

Agency: Arizona Historical Society

Program: Arizona Historical Society

Fund: HI2900-N Permanent AZ Historical Society Revolving Fund (Non-Appropriated)

		FY 2022 Actual	FY 2023 Expd. Plan	FY 2024 Fund. Issue	FY 2024 Total Request
Program Expenditures					
COST CENTER/PROGRAM BUDGET UNIT					
1-1	Arizona Historical Society	107.5	443.4	0.0	443.4
1-3	SLI Papago Park Museum	14.7	196.2	0.0	196.2
1-4	SLI FY 2023 Salary Increase	0.0	0.0	0.0	0.0
	Total	122.2	639.6	0.0	639.6
Non-Appropriated Funding					
Expenditure Categories					
FTE Positions		5.0	13.5	0.0	13.5
Personal Services		5.4	337.7	0.0	337.7
Employee Related Expenses		2.5	123.1	0.0	123.1
Professional and Outside Services		16.9	30.0	0.0	30.0
Travel In-State		0.3	0.0	0.0	0.0
Travel Out of State		0.0	0.0	0.0	0.0
Food		0.0	0.0	0.0	0.0
Aid to Organizations and Individuals		0.0	0.0	0.0	0.0
Other Operating Expenses		94.1	148.8	0.0	148.8
Equipment		3.0	0.0	0.0	0.0
Capital Outlay		0.0	0.0	0.0	0.0
Debt Service		0.0	0.0	0.0	0.0
Cost Allocation		0.0	0.0	0.0	0.0
Transfers		0.0	0.0	0.0	0.0
Expenditure Categories Total:		122.2	639.6	0.0	639.6
Fund HI2900-N Total:		122.2	639.6	0.0	639.6
Program 1 Total:		3,851.1	4,558.7	0.0	4,732.9

Program Summary of Expenditures and Budget Request

Agency: Arizona Historical Society
Program: Arizona Historical Society

		FY 2022 Actual	FY 2023 Expd. Plan	FY 2024 Fund. Issue	FY 2024 Total Request
Program Summary					
1-1	Arizona Historical Society	3,299.9	3,301.2	0.0	3,475.4
1-2	SLI Field Services and Grants	62.7	68.8	0.0	68.8
1-3	SLI Papago Park Museum	488.5	1,147.2	0.0	1,147.2
1-4	SLI FY 2023 Salary Increase	0.0	198.6	0.0	198.6
	Program Summary Total:	3,851.1	4,715.8	0.0	4,890.0
Expenditure Categories					
0000	FTE Positions	49.0	83.0	0.0	83.0
6000	Personal Services	1,701.0	2,453.7	0.0	2,627.9
6100	Employee Related Expenses	671.2	1,026.1	0.0	1,026.1
6200	Professional and Outside Services	171.0	115.5	0.0	115.5
6500	Travel In-State	17.9	17.3	0.0	17.3
6600	Travel Out of State	0.3	0.0	0.0	0.0
6700	Food	0.0	0.0	0.0	0.0
6800	Aid to Organizations and Individuals	44.7	45.7	0.0	45.7
7000	Other Operating Expenses	1,222.1	1,051.5	0.0	1,051.5
8000	Equipment	9.7	6.0	0.0	6.0
8100	Capital Outlay	0.0	0.0	0.0	0.0
8600	Debt Service	0.0	0.0	0.0	0.0
9000	Cost Allocation	0.0	0.0	0.0	0.0
9100	Transfers	13.2	0.0	0.0	0.0
	Expenditure Categories Total:	3,851.1	4,715.8	0.0	4,890.0
Fund Source					
Appropriated Funds					
AA1000-A	General Fund (Appropriated)	2,867.6	3,371.8	0.0	3,371.8
		2,867.6	3,371.8	0.0	3,371.8
Non-Appropriated Funds					
HI2000-N	Federal Grants Fund (Non-Appropriated)	668.9	30.0	0.0	30.0
HI2025-N	Donations Fund (Non-Appropriated)	185.8	651.4	0.0	825.6
HI2125-N	Historical Society Preservation/Restoration Fund (	6.6	23.0	0.0	23.0
HI2900-N	Permanent AZ Historical Society Revolving Fund (	122.2	639.6	0.0	639.6
		983.5	1,344.0	0.0	1,518.2
	Fund Source Total:	3,851.1	4,715.8	0.0	4,890.0

Program Budget Unit Summary of Expenditures and Budget Request for Selected Funds

Agency: Arizona Historical Society

Program: Arizona Historical Society

Fund: AA1000-A General Fund

Appropriated

		FY 2022 Actual	FY 2023 Expd. Plan	FY 2024 Fund. Issue	FY 2024 Total Request
0000	FTE	19.0	26.0	0.0	26.0
6000	Personal Services	1,090.1	1,470.5	0.0	1,470.5
6100	Employee Related Expenses	420.2	634.8	0.0	634.8
6200	Professional and Outside Services	51.9	35.0	0.0	35.0
6500	Travel In-State	14.7	12.3	0.0	12.3
6600	Travel Out of State	0.3	6.5	0.0	6.5
6700	Food	0.0	0.0	0.0	0.0
6800	Aid to Organizations and Individuals	6.7	6.7	0.0	6.7
7000	Other Operating Expenses	750.5	257.6	0.0	257.6
8000	Equipment	0.0	4.2	0.0	4.2
8100	Capital Outlay	0.0	0.0	0.0	0.0
8600	Debt Service	0.0	0.0	0.0	0.0
9000	Cost Allocation	0.0	0.0	0.0	0.0
9100	Transfers	0.0	0.0	0.0	0.0
Appropriated Total:		2,334.4	2,427.6	0.0	2,427.6
Fund Total:		2,334.4	2,427.6	0.0	2,427.6

Fund: HI2000-N Federal Grants Fund

Non-Appropriated

0000	FTE	16.5	0.0	0.0	0.0
6000	Personal Services	477.1	0.0	0.0	0.0
6100	Employee Related Expenses	190.2	0.0	0.0	0.0
6200	Professional and Outside Services	1.3	15.0	0.0	15.0
6500	Travel In-State	0.0	0.0	0.0	0.0
6600	Travel Out of State	0.0	0.0	0.0	0.0
6700	Food	0.0	0.0	0.0	0.0
6800	Aid to Organizations and Individuals	0.0	0.0	0.0	0.0
7000	Other Operating Expenses	0.3	15.0	0.0	15.0
8000	Equipment	0.0	0.0	0.0	0.0
8100	Capital Outlay	0.0	0.0	0.0	0.0

Program Budget Unit Summary of Expenditures and Budget Request for Selected Funds

Agency: Arizona Historical Society

Program: Arizona Historical Society

		FY 2022 Actual	FY 2023 Expd. Plan	FY 2024 Fund. Issue	FY 2024 Total Request
Fund: HI2000-N Federal Grants Fund					
Non-Appropriated					
8600	Debt Service	0.0	0.0	0.0	0.0
9000	Cost Allocation	0.0	0.0	0.0	0.0
9100	Transfers	0.0	0.0	0.0	0.0
Non-Appropriated Total:		668.9	30.0	0.0	30.0
Fund Total:		668.9	30.0	0.0	30.0
Fund: HI2025-N Donations Fund					
Non-Appropriated					
0000	FTE	0.0	1.0	0.0	1.0
6000	Personal Services	9.6	87.4	0.0	261.6
6100	Employee Related Expenses	4.6	35.0	0.0	35.0
6200	Professional and Outside Services	100.9	30.0	0.0	30.0
6500	Travel In-State	1.1	0.0	0.0	0.0
6600	Travel Out of State	0.0	0.0	0.0	0.0
6700	Food	0.0	0.0	0.0	0.0
6800	Aid to Organizations and Individuals	0.0	0.0	0.0	0.0
7000	Other Operating Expenses	48.2	245.5	0.0	245.5
8000	Equipment	4.9	5.0	0.0	5.0
8100	Capital Outlay	0.0	0.0	0.0	0.0
8600	Debt Service	0.0	0.0	0.0	0.0
9000	Cost Allocation	0.0	0.0	0.0	0.0
9100	Transfers	13.2	0.0	0.0	0.0
Non-Appropriated Total:		182.5	402.9	0.0	577.1
Fund Total:		182.5	402.9	0.0	577.1
Fund: HI2125-N Historical Society Preservation/Restoration Fund					
Non-Appropriated					
6000	Personal Services	0.0	0.0	0.0	0.0
6100	Employee Related Expenses	0.0	0.0	0.0	0.0

Program Budget Unit Summary of Expenditures and Budget Request for Selected Funds

Agency: Arizona Historical Society

Program: Arizona Historical Society

Fund: HI2125-N Historical Society Preservation/Restoration Fund

Non-Appropriated

		FY 2022 Actual	FY 2023 Expd. Plan	FY 2024 Fund. Issue	FY 2024 Total Request
6200	Professional and Outside Services	0.0	0.0	0.0	0.0
6500	Travel In-State	0.0	0.0	0.0	0.0
6600	Travel Out of State	0.0	0.0	0.0	0.0
6700	Food	0.0	0.0	0.0	0.0
6800	Aid to Organizations and Individuals	0.0	0.0	0.0	0.0
7000	Other Operating Expenses	6.6	23.0	0.0	23.0
8000	Equipment	0.0	0.0	0.0	0.0
8100	Capital Outlay	0.0	0.0	0.0	0.0
8600	Debt Service	0.0	0.0	0.0	0.0
9000	Cost Allocation	0.0	0.0	0.0	0.0
9100	Transfers	0.0	0.0	0.0	0.0
Non-Appropriated Total:		6.6	23.0	0.0	23.0
Fund Total:		6.6	23.0	0.0	23.0

Fund: HI2900-N Permanent AZ Historical Society Revolving Fund

Non-Appropriated

0000	FTE	2.0	10.5	0.0	10.5
6000	Personal Services	5.4	261.6	0.0	261.6
6100	Employee Related Expenses	2.5	78.0	0.0	78.0
6200	Professional and Outside Services	5.5	5.0	0.0	5.0
6500	Travel In-State	0.3	0.0	0.0	0.0
6600	Travel Out of State	0.0	0.0	0.0	0.0
6700	Food	0.0	0.0	0.0	0.0
6800	Aid to Organizations and Individuals	0.0	0.0	0.0	0.0
7000	Other Operating Expenses	90.8	98.8	0.0	98.8
8000	Equipment	3.0	0.0	0.0	0.0
8100	Capital Outlay	0.0	0.0	0.0	0.0
8600	Debt Service	0.0	0.0	0.0	0.0
9000	Cost Allocation	0.0	0.0	0.0	0.0
9100	Transfers	0.0	0.0	0.0	0.0

Program Budget Unit Summary of Expenditures and Budget Request for Selected Funds

Agency: Arizona Historical Society

Program: Arizona Historical Society

Fund: HI2900-N Permanent AZ Historical Society Revolving Fund

Non-Appropriated

	FY 2022 Actual	FY 2023 Expd. Plan	FY 2024 Fund. Issue	FY 2024 Total Request
Non-Appropriated Total:	107.5	443.4	0.0	443.4
Fund Total:	107.5	443.4	0.0	443.4
Program Total For Selected Funds:	3,299.9	3,326.9	0.0	3,501.1

Program Budget Unit Summary of Expenditures and Budget Request for Selected Funds

Agency: Arizona Historical Society

Program: SLI Field Services and Grants

Fund: AA1000-A General Fund

Appropriated

		FY 2022 Actual	FY 2023 Expd. Plan	FY 2024 Fund. Issue	FY 2024 Total Request
0000	FTE	0.5	0.5	0.0	0.5
6000	Personal Services	18.7	20.2	0.0	20.2
6100	Employee Related Expenses	6.0	8.6	0.0	8.6
6200	Professional and Outside Services	0.0	0.0	0.0	0.0
6500	Travel In-State	0.0	0.0	0.0	0.0
6600	Travel Out of State	0.0	0.0	0.0	0.0
6700	Food	0.0	0.0	0.0	0.0
6800	Aid to Organizations and Individuals	35.0	35.0	0.0	35.0
7000	Other Operating Expenses	0.0	0.0	0.0	0.0
8000	Equipment	0.0	0.0	0.0	0.0
8100	Capital Outlay	0.0	0.0	0.0	0.0
8600	Debt Service	0.0	0.0	0.0	0.0
9000	Cost Allocation	0.0	0.0	0.0	0.0
9100	Transfers	0.0	0.0	0.0	0.0
Appropriated Total:		59.7	63.8	0.0	63.8
Fund Total:		59.7	63.8	0.0	63.8

Fund: HI2025-N Donations Fund

Non-Appropriated

6000	Personal Services	0.0	0.0	0.0	0.0
6100	Employee Related Expenses	0.0	0.0	0.0	0.0
6200	Professional and Outside Services	0.0	0.0	0.0	0.0
6500	Travel In-State	0.0	0.0	0.0	0.0
6600	Travel Out of State	0.0	0.0	0.0	0.0
6700	Food	0.0	0.0	0.0	0.0
6800	Aid to Organizations and Individuals	3.0	4.0	0.0	4.0
7000	Other Operating Expenses	0.0	1.0	0.0	1.0
8000	Equipment	0.0	0.0	0.0	0.0
8100	Capital Outlay	0.0	0.0	0.0	0.0

Program Budget Unit Summary of Expenditures and Budget Request for Selected Funds

Agency: Arizona Historical Society

Program: SLI Field Services and Grants

Fund: HI2025-N Donations Fund

Non-Appropriated

		FY 2022 Actual	FY 2023 Expd. Plan	FY 2024 Fund. Issue	FY 2024 Total Request
8600	Debt Service	0.0	0.0	0.0	0.0
9000	Cost Allocation	0.0	0.0	0.0	0.0
9100	Transfers	0.0	0.0	0.0	0.0
Non-Appropriated Total:		3.0	5.0	0.0	5.0
Fund Total:		3.0	5.0	0.0	5.0
Program Total For Selected Funds:		62.7	68.8	0.0	68.8

Program Budget Unit Summary of Expenditures and Budget Request for Selected Funds

Agency: Arizona Historical Society

Program: SLI Papago Park Museum

Fund: AA1000-A General Fund

Appropriated

		FY 2022 Actual	FY 2023 Expd. Plan	FY 2024 Fund. Issue	FY 2024 Total Request
0000	FTE	8.0	8.0	0.0	8.0
6000	Personal Services	100.1	381.3	0.0	381.3
6100	Employee Related Expenses	47.7	182.5	0.0	182.5
6200	Professional and Outside Services	0.0	5.0	0.0	5.0
6500	Travel In-State	1.8	5.0	0.0	5.0
6600	Travel Out of State	0.0	0.0	0.0	0.0
6700	Food	0.0	0.0	0.0	0.0
6800	Aid to Organizations and Individuals	0.0	0.0	0.0	0.0
7000	Other Operating Expenses	322.1	149.5	0.0	149.5
8000	Equipment	1.8	0.0	0.0	0.0
8100	Capital Outlay	0.0	0.0	0.0	0.0
8600	Debt Service	0.0	0.0	0.0	0.0
9000	Cost Allocation	0.0	0.0	0.0	0.0
9100	Transfers	0.0	0.0	0.0	0.0
Appropriated Total:		473.5	723.3	0.0	723.3
Fund Total:		473.5	723.3	0.0	723.3

Fund: HI2025-N Donations Fund

Non-Appropriated

6000	Personal Services	0.0	0.0	0.0	0.0
6100	Employee Related Expenses	0.0	0.0	0.0	0.0
6200	Professional and Outside Services	0.0	0.5	0.0	0.5
6500	Travel In-State	0.0	0.0	0.0	0.0
6600	Travel Out of State	0.0	0.0	0.0	0.0
6700	Food	0.0	0.0	0.0	0.0
6800	Aid to Organizations and Individuals	0.0	0.0	0.0	0.0
7000	Other Operating Expenses	0.3	242.0	0.0	242.0
8000	Equipment	0.0	1.0	0.0	1.0
8100	Capital Outlay	0.0	0.0	0.0	0.0

Program Budget Unit Summary of Expenditures and Budget Request for Selected Funds

Agency: Arizona Historical Society

Program: SLI Papago Park Museum

Fund: HI2025-N Donations Fund

Non-Appropriated

		FY 2022 Actual	FY 2023 Expd. Plan	FY 2024 Fund. Issue	FY 2024 Total Request
8600	Debt Service	0.0	0.0	0.0	0.0
9000	Cost Allocation	0.0	0.0	0.0	0.0
9100	Transfers	0.0	0.0	0.0	0.0
Non-Appropriated Total:		0.3	243.5	0.0	243.5
Fund Total:		0.3	243.5	0.0	243.5

Fund: HI2900-N Permanent AZ Historical Society Revolving Fund

Non-Appropriated

0000	FTE	3.0	3.0	0.0	3.0
6000	Personal Services	0.0	76.1	0.0	76.1
6100	Employee Related Expenses	0.0	45.1	0.0	45.1
6200	Professional and Outside Services	11.4	25.0	0.0	25.0
6500	Travel In-State	0.0	0.0	0.0	0.0
6600	Travel Out of State	0.0	0.0	0.0	0.0
6700	Food	0.0	0.0	0.0	0.0
6800	Aid to Organizations and Individuals	0.0	0.0	0.0	0.0
7000	Other Operating Expenses	3.3	50.0	0.0	50.0
8000	Equipment	0.0	0.0	0.0	0.0
8100	Capital Outlay	0.0	0.0	0.0	0.0
8600	Debt Service	0.0	0.0	0.0	0.0
9000	Cost Allocation	0.0	0.0	0.0	0.0
9100	Transfers	0.0	0.0	0.0	0.0
Non-Appropriated Total:		14.7	196.2	0.0	196.2
Fund Total:		14.7	196.2	0.0	196.2
Program Total For Selected Funds:		488.5	1,163.0	0.0	1,163.0

Program Budget Unit Summary of Expenditures and Budget Request for Selected Funds

Agency: Arizona Historical Society

Program: SLI FY 2023 Salary Increase

Fund: AA1000-A General Fund

Appropriated

		FY 2022 Actual	FY 2023 Expd. Plan	FY 2024 Fund. Issue	FY 2024 Total Request
0000	FTE	0.0	0.0	0.0	0.0
6000	Personal Services	0.0	0.0	0.0	0.0
6100	Employee Related Expenses	0.0	0.0	0.0	0.0
6200	Professional and Outside Services	0.0	0.0	0.0	0.0
6500	Travel In-State	0.0	0.0	0.0	0.0
6600	Travel Out of State	0.0	0.0	0.0	0.0
6700	Food	0.0	0.0	0.0	0.0
6800	Aid to Organizations and Individuals	0.0	0.0	0.0	0.0
7000	Other Operating Expenses	0.0	0.0	0.0	0.0
8000	Equipment	0.0	0.0	0.0	0.0
8100	Capital Outlay	0.0	0.0	0.0	0.0
8600	Debt Service	0.0	0.0	0.0	0.0
9000	Cost Allocation	0.0	0.0	0.0	0.0
9100	Transfers	0.0	0.0	0.0	0.0
Appropriated Total:		0.0	0.0	0.0	0.0
Fund Total:		0.0	0.0	0.0	0.0

Fund: HI2900-N Permanent AZ Historical Society Revolving Fund

Non-Appropriated

0000	FTE	0.0	0.0	0.0	0.0
6000	Personal Services	0.0	0.0	0.0	0.0
6100	Employee Related Expenses	0.0	0.0	0.0	0.0
6200	Professional and Outside Services	0.0	0.0	0.0	0.0
6500	Travel In-State	0.0	0.0	0.0	0.0
6600	Travel Out of State	0.0	0.0	0.0	0.0
6700	Food	0.0	0.0	0.0	0.0
6800	Aid to Organizations and Individuals	0.0	0.0	0.0	0.0
7000	Other Operating Expenses	0.0	0.0	0.0	0.0
8000	Equipment	0.0	0.0	0.0	0.0
8100	Capital Outlay	0.0	0.0	0.0	0.0

Program Budget Unit Summary of Expenditures and Budget Request for Selected Funds

Agency: Arizona Historical Society

Program: SLI FY 2023 Salary Increase

Fund: HI2900-N Permanent AZ Historical Society Revolving Fund

Non-Appropriated

		FY 2022 Actual	FY 2023 Expd. Plan	FY 2024 Fund. Issue	FY 2024 Total Request
8600	Debt Service	0.0	0.0	0.0	0.0
9000	Cost Allocation	0.0	0.0	0.0	0.0
9100	Transfers	0.0	0.0	0.0	0.0
Non-Appropriated Total:		0.0	0.0	0.0	0.0
Fund Total:		0.0	0.0	0.0	0.0
Program Total For Selected Funds:		0.0	0.0	0.0	0.0

Program Budget Unit Summary of Expenditures and Budget Request for All Funds

Agency: Arizona Historical Society
Program: Arizona Historical Society

Expenditure Categories		FY 2022 Actual	FY 2023 Expd. Plan	FY 2024 Fund. Issue	FY 2024 Total Request
0000	FTE	37.5	37.5	0.0	37.5
6000	Personal Services	1,582.2	1,819.5	0.0	1,993.7
6100	Employee Related Expenses	617.5	747.8	0.0	747.8
6200	Professional and Outside Services	159.6	85.0	0.0	85.0
6500	Travel In-State	16.1	12.3	0.0	12.3
6600	Travel Out of State	0.3	0.0	0.0	0.0
6700	Food	0.0	0.0	0.0	0.0
6800	Aid to Organizations and Individuals	6.7	6.7	0.0	6.7
7000	Other Operating Expenses	896.4	624.9	0.0	624.9
8000	Equipment	7.9	5.0	0.0	5.0
8100	Capital Outlay	0.0	0.0	0.0	0.0
8600	Debt Service	0.0	0.0	0.0	0.0
9000	Cost Allocation	0.0	0.0	0.0	0.0
9100	Transfers	13.2	0.0	0.0	0.0
	Expenditure Categories Total:	3,299.9	3,301.2	0.0	3,475.4
Fund Source					
Appropriated Funds					
AA1000-A	General Fund (Appropriated)	2,334.4	2,401.9	0.0	2,401.9
		2,334.4	2,401.9	0.0	2,401.9
Non-Appropriated Funds					
HI2000-N	Federal Grants Fund (Non-Appropriated)	668.9	30.0	0.0	30.0
HI2025-N	Donations Fund (Non-Appropriated)	182.5	402.9	0.0	577.1
HI2125-N	Historical Society Preservation/Restoration Fund (	6.6	23.0	0.0	23.0
HI2900-N	Permanent AZ Historical Society Revolving Fund (	107.5	443.4	0.0	443.4
		965.5	899.3	0.0	1,073.5
	Fund Source Total:	3,299.9	3,301.2	0.0	3,475.4

Program Expenditure Schedule

Agency:	**Arizona Historical Society**
Program:	**Arizona Historical Society**

		FY 2022 Actual	FY 2023 Expd. Plan
FTE		37.5	37.5
	Expenditure Category Total	**37.5**	**37.5**
Appropriated			
AA1000-A	General Fund (Appropriated)	19.0	26.0
		19.0	**26.0**
Non-Appropriated			
HI2000-N	Federal Grants Fund (Non-Appropriated)	16.5	0.0
HI2025-N	Donations Fund (Non-Appropriated)	0.0	1.0
HI2900-N	Permanent AZ Historical Society Revolving Fund (Non-App	2.0	10.5
		18.5	**11.5**
	Fund Source Total	**37.5**	**37.5**

Personal Services		1,582.2	1,819.5
Boards and Commissions		0.0	0.0
	Expenditure Category Total	**1,582.2**	**1,819.5**
Appropriated			
AA1000-A	General Fund (Appropriated)	1,090.1	1,470.5
		1,090.1	**1,470.5**
Non-Appropriated			
HI2000-N	Federal Grants Fund (Non-Appropriated)	477.1	0.0
HI2025-N	Donations Fund (Non-Appropriated)	9.6	87.4
HI2900-N	Permanent AZ Historical Society Revolving Fund (Non-App	5.4	261.6
		492.1	**349.0**
	Fund Source Total	**1,582.2**	**1,819.5**

Employee Related Expenses		617.5	747.8
	Expenditure Category Total	**617.5**	**747.8**
Appropriated			
AA1000-A	General Fund (Appropriated)	420.2	634.8
		420.2	**634.8**
Non-Appropriated			
HI2000-N	Federal Grants Fund (Non-Appropriated)	190.2	0.0
HI2025-N	Donations Fund (Non-Appropriated)	4.6	35.0
HI2900-N	Permanent AZ Historical Society Revolving Fund (Non-App	2.5	78.0
		197.3	**113.0**
	Fund Source Total	**617.5**	**747.8**

Professional and Outside Services		85.0
External Prof/Outside Serv Budg And Appn	0.0	
External Investment Services	0.0	
Other External Financial Services	0.0	
Attorney General Legal Services	0.7	
External Legal Services	0.0	
External Engineer/Architect Cost - Exp	0.0	
External Engineer/Architect Cost- Cap	0.0	
Other Design	0.0	
Temporary Agency Services	0.0	
Hospital Services	0.0	
Other Medical Services	0.0	
Institutional Care	0.0	

Program Expenditure Schedule

Agency:	**Arizona Historical Society**
Program:	**Arizona Historical Society**

	FY 2022 Actual	FY 2023 Expd. Plan
Education And Training	0.0	
Vendor Travel	0.0	
Professional & Outside Services Excluded from Cost Alloca	0.0	
Vendor Travel - Non Reportable	0.0	
External Telecom Consulting Services	0.0	
Costs related to those in custody of the State	0.0	
Non - Confidential Specialist Fees	0.0	
Confidential Specialist Fees	0.0	
Outside Actuarial Costs	0.0	
Other Professional And Outside Services	158.9	
Expenditure Category Total	**159.6**	**85.0**
Appropriated		
AA1000-A General Fund (Appropriated)	51.9	35.0
	51.9	**35.0**
Non-Appropriated		
HI2000-N Federal Grants Fund (Non-Appropriated)	1.3	15.0
HI2025-N Donations Fund (Non-Appropriated)	100.9	30.0
HI2900-N Permanent AZ Historical Society Revolving Fund (Non-App	5.5	5.0
	107.7	**50.0**
Fund Source Total	**159.6**	**85.0**
Travel In-State	16.1	12.3
Expenditure Category Total	**16.1**	**12.3**
Appropriated		
AA1000-A General Fund (Appropriated)	14.7	12.3
	14.7	**12.3**
Non-Appropriated		
HI2025-N Donations Fund (Non-Appropriated)	1.1	0.0
HI2900-N Permanent AZ Historical Society Revolving Fund (Non-App	0.3	0.0
	1.4	**0.0**
Fund Source Total	**16.1**	**12.3**
Travel Out of State	0.3	6.5
Expenditure Category Total	**0.3**	**6.5**
Appropriated		
AA1000-A General Fund (Appropriated)	0.3	6.5
	0.3	**6.5**
Fund Source Total	**0.3**	**6.5**
Food	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Aid to Organizations and Individuals	6.7	6.7
Expenditure Category Total	**6.7**	**6.7**
Appropriated		
AA1000-A General Fund (Appropriated)	6.7	6.7
	6.7	**6.7**
Fund Source Total	**6.7**	**6.7**
Other Operating Expenses		639.9

Program Expenditure Schedule

Agency:	**Arizona Historical Society**
Program:	**Arizona Historical Society**

	FY 2022 Actual	FY 2023 Expd. Plan
Other Operating Expenditures Budg Approp	0.0	
Other Operating Expenditures Excluded from Cost Allocati	0.0	
Risk Management Charges To State Agency	237.6	
Risk Management Deductible - Indemnity	0.0	
Risk Management Deductible - Legal	0.0	
Risk Management Deductible - Medical	0.0	
Risk Management Deductible - Other	0.0	
Gen Liab- Non Physical-Taxable- Self Ins	0.0	
Gross Proceeds Payments To Attorneys	0.0	
General Liability- Non-Taxable- Self Ins	0.0	
Medical Malpractice - Self-Insured	0.0	
Automobile Liability - Self Insured	0.0	
General Property Damage - Self- Insured	0.0	
Automobile Physical Damage-Self Insured	0.0	
Liability Insurance Premiums	0.0	
Property Insurance Premiums	0.0	
Workers Compensation Benefit Payments	0.0	
Self Insurance - Administrative Fees	0.0	
Self Insurance - Premiums	0.0	
Self Insurance - Claim Payments	0.0	
Self Insurance - Pharmacy Claims	0.0	
Premium Tax On Altcs	0.0	
Other Insurance-Related Charges	0.0	
Internal Service Data Processing	0.0	
Internal Service Data Proc- Pc/Lan	0.0	
External Programming-Mainframe/Legacy	0.0	
External Programming- Pc/Lan/Serv/Web	0.0	
External Data Entry	0.0	
Othr External Data Proc-Mainframe/Legacy	0.0	
Othr External Data Proc-Pc/Lan/Serv/Web	0.0	
Pmt for AFIS Development & Usage	10.9	
Internal Service Telecommunications	0.0	
External Telecom Long Distance-In-State	61.4	
External Telecom Long Distance-Out-State	0.0	
Other External Telecommunication Service	0.0	
Electricity	163.5	
Sanitation Waste Disposal	2.2	
Water	37.8	
Gas And Fuel Oil For Buildings	29.1	
Other Utilities	0.0	
Building Rent Charges To State Agencies	0.0	
Priv Lease To Own Bld Rent Chrgs To Agy	0.0	
Cert Of Part Bld Rent Chrgs To Agy	0.0	
Rental Of Land And Buildings	0.0	
Rental Of Computer Equipment	0.0	
Rental Of Other Machinery And Equipment	0.3	
Miscellaneous Rent	11.0	
Interest On Overdue Payments	0.0	
All Other Interest Payments	0.0	
Internal Acct/Budg/Financial Svcs	0.0	
Other Internal Services	0.0	

Program Expenditure Schedule

Agency:	**Arizona Historical Society**
Program:	**Arizona Historical Society**

	FY 2022 Actual	FY 2023 Expd. Plan
Repair And Maintenance - Buildings	64.1	
Repair And Maintenance - Vehicles	13.3	
Repair And Maint - Mainframe And Legacy	14.5	
Repair And Maint-Pc/Lan/Serv/Web	0.0	
Repair And Maintenance - Other Equipment	4.1	
Other Repair And Maintenance	42.6	
Software Support And Maintenance	35.5	
Uniforms	0.0	
Inmate Clothing	0.0	
Security Supplies	0.0	
Office Supplies	22.3	
Computer Supplies	0.0	
Housekeeping Supplies	3.1	
Bedding And Bath Supplies	0.0	
Drugs And Medicine Supplies	0.0	
Medical Supplies	0.0	
Dental Supplies	0.0	
Automotive And Transportation Fuels	0.0	
Automotive Lubricants And Supplies	0.0	
Rpr And Maint Supplies-Not Auto Or Build	13.2	
Repair And Maintenance Supplies-Building	0.1	
Other Operating Supplies	11.1	
Publications	0.3	
Aggregate Withheld Or Paid Commissions	0.0	
Lottery Prizes	0.0	
Lottery Distribution Costs	0.0	
Material for Further Processing	0.0	
Other Resale Supplies	3.9	
Loss On Sales Of Capital Assets	0.0	
Loss on Sales of Investments	0.0	
Employee Tuition Reimbursement-Graduate	0.0	
Employee Tuition Reimb Under-Grad/Other	0.0	
Conference Registration-Attendance Fees	0.9	
Other Education And Training Costs	0.1	
Advertising	5.1	
Sponsorships	0.0	
Internal Printing	0.0	
External Printing	51.3	
Photography	0.1	
Postage And Delivery	24.9	
Document shredding and Destruction Services	0.0	
Translation and Sign Language Services	0.0	
Distribution To State Universities	0.0	
Other Intrastate Distributions	0.0	
Awards	3.9	
Entertainment And Promotional Items	0.9	
Dues	10.6	
Books- Subscriptions And Publications	6.9	
Costs For Digital Image Or Microfilm	0.0	
Revolving Fund Advances	0.0	
Credit Card Fees Over Approved Limit	0.0	

Program Expenditure Schedule

Agency:	**Arizona Historical Society**
Program:	**Arizona Historical Society**

	FY 2022 Actual	FY 2023 Expd. Plan
Relief Bill Expenditures	0.0	
Surplus Property Distr To State Agencies	0.0	
Security Services	0.0	
Judgments - Damages	0.0	
ICA Payments to Claimants Confidential	0.0	
Jdgmnt-Confidential Restitution To Indiv	0.0	
Judgments - Non-Confidential Restitution	0.0	
Judgments - Punitive And Compensatory	0.0	
Pmts Made to Resolve/Disputes/Avoid Costs of Litigation	0.0	
Pmts For Contracted State Inmate Labor	0.0	
Payments To State Inmates	0.0	
Bad Debt Expense	0.0	
Interview Expense	0.0	
Employee Relocations-Nontaxable	0.0	
Employee Relocations-Taxable	0.0	
Non-Confidential Invest/Legal/Law Enf	0.0	
Conf/Sensitive Invest/Legal/Undercover	0.0	
Fingerprinting, Background Checks, Etc.	0.0	
Other Miscellaneous Operating	9.8	
Expenditure Category Total	**896.4**	**639.9**
Appropriated		
AA1000-A General Fund (Appropriated)	750.5	257.6
	750.5	**257.6**
Non-Appropriated		
HI2000-N Federal Grants Fund (Non-Appropriated)	0.3	15.0
HI2025-N Donations Fund (Non-Appropriated)	48.2	245.5
HI2125-N Historical Society Preservation/Restoration Fund (Non-App	6.6	23.0
HI2900-N Permanent AZ Historical Society Revolving Fund (Non-App	90.8	98.8
	145.9	**382.3**
Fund Source Total	**896.4**	**639.9**

Current Year Expenditures		9.2
Capital Equipment Budget And Approp	0.0	
Vehicles Capital Purchase	0.0	
Vehicles Capital Leases	0.0	
Furniture Capital Purchase	0.0	
Depreciable Works Of Art & Hist Treas/Coll Capital Purcha	0.0	
Non Depr Works Of Art & Hist Treas/Coll Cap Purchase	0.0	
Furniture Capital Leases	0.0	
Computer Equipment Capital Purchase	0.0	
Computer Equipment Capital Lease	0.0	
Telecommunication Equip-Capital Purchase	0.0	
Telecommunication Equip-Capital Lease	0.0	
Other Equipment Capital Purchase	0.0	
Other Equipment Capital Leases	0.0	
Purchased Or Licensed Software-Website	0.0	
Internally Generated Software-Website	0.0	
Development in Progress	0.0	
Right-Of-Way/Easement/Extraction Rights	0.0	
Oth Int Assets purchased, licensed or internally generate	0.0	
Other intangible assets acquired by capital lease	0.0	

Program Expenditure Schedule

Agency:	**Arizona Historical Society**
Program:	**Arizona Historical Society**

	FY 2022 Actual	FY 2023 Expd. Plan
Other Capital Asset Purchases	0.0	
Leasehold Improvement-Capital Purchase	0.0	
Other Capital Asset Leases	0.0	
Non-Capital Equip Budget And Approp	0.0	
Vehicles Non-Capital Purchase	0.0	
Vehicles Non-Capital Leases	0.0	
Furniture Non-Capital Purchase	2.4	
Works Of Art And Hist Treas-Non Capital	0.0	
Furniture Non-Capital Leases	0.0	
Computer Equipment Non-Capital Purchase	0.0	
Computer Equipment Non-Capital Lease	0.0	
Telecomm Equip Non-Capital Purchase	0.0	
Telecomm Equip Non-Capital Leases	0.0	
Other Equipment Non-Capital Purchase	5.5	
Weapons Non-Capital Purchase	0.0	
Other Equipment Non-Capital Lease	0.0	
Purchased Or Licensed Software/Website	0.0	
Internally Generated Software/Website	0.0	
LICENSES AND PERMITS	0.0	
Right-Of-Way/Easement/Extraction Exp	0.0	
Other Intangible Assets - Purchased, Licensed or Internall	0.0	
Noncapital Software/Web By Capital Lease	0.0	
Other Intangible Assets Acquired by Capital Lease	0.0	
Other Long Lived Tangible Assets to be Expenses	0.0	
Non-Capital Equipment Excluded from Cost Allocation	0.0	
Expenditure Category Total	**7.9**	**9.2**
Appropriated		
AA1000-A General Fund (Appropriated)	0.0	4.2
	0.0	**4.2**
Non-Appropriated		
HI2025-N Donations Fund (Non-Appropriated)	4.9	5.0
HI2900-N Permanent AZ Historical Society Revolving Fund (Non-App	3.0	0.0
	7.9	**5.0**
Fund Source Total	**7.9**	**9.2**
Capital Outlay	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Debt Service	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Cost Allocation	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Transfers	13.2	0.0

Program Expenditure Schedule

Agency:	**Arizona Historical Society**
Program:	**Arizona Historical Society**

	FY 2022 Actual	FY 2023 Expd. Plan
Expenditure Category Total	**13.2**	**0.0**
Non-Appropriated		
HI2025-N Donations Fund (Non-Appropriated)	13.2	0.0
	13.2	**0.0**
Fund Source Total	**13.2**	**0.0**

Employee Retirement Coverage

Retirement System	FTE	Personal Services	Fund#
Arizona State Retirement System	27.5	1,470.5	AA1000-A
Arizona State Retirement System	1.0	87.4	HI2025-N
Arizona State Retirement System	9.0	261.6	HI2900-N

Combined Regular & Elected Positions At/Above FICA Maximum of $147,000

Total FTE	Personal Services	FTE's not eligible for Health, Dental & Life
0.0	0.0	0.0

Program Expenditure Schedule

Agency:	**Arizona Historical Society**
Program:	**SLI Field Services and Grants**

	FY 2022 Actual	FY 2023 Expd. Plan
FTE	0.5	0.5
Expenditure Category Total	**0.5**	**0.5**
Appropriated		
AA1000-A General Fund (Appropriated)	0.5	0.5
	0.5	**0.5**
Fund Source Total	**0.5**	**0.5**
Personal Services	18.7	20.2
Boards and Commissions	0.0	0.0
Expenditure Category Total	**18.7**	**20.2**
Appropriated		
AA1000-A General Fund (Appropriated)	18.7	20.2
	18.7	**20.2**
Fund Source Total	**18.7**	**20.2**
Employee Related Expenses	6.0	8.6
Expenditure Category Total	**6.0**	**8.6**
Appropriated		
AA1000-A General Fund (Appropriated)	6.0	8.6
	6.0	**8.6**
Fund Source Total	**6.0**	**8.6**
Professional and Outside Services		0.0
External Prof/Outside Serv Budg And Appn	0.0	
External Investment Services	0.0	
Other External Financial Services	0.0	
Attorney General Legal Services	0.0	
External Legal Services	0.0	
External Engineer/Architect Cost - Exp	0.0	
External Engineer/Architect Cost- Cap	0.0	
Other Design	0.0	
Temporary Agency Services	0.0	
Hospital Services	0.0	
Other Medical Services	0.0	
Institutional Care	0.0	
Education And Training	0.0	
Vendor Travel	0.0	
Professional & Outside Services Excluded from Cost Alloca	0.0	
Vendor Travel - Non Reportable	0.0	
External Telecom Consulting Services	0.0	
Costs related to those in custody of the State	0.0	
Non - Confidential Specialist Fees	0.0	
Confidential Specialist Fees	0.0	
Outside Actuarial Costs	0.0	
Other Professional And Outside Services	0.0	

Program Expenditure Schedule

Agency:	**Arizona Historical Society**
Program:	**SLI Field Services and Grants**

	FY 2022 Actual	FY 2023 Expd. Plan
Expenditure Category Total	**0.0**	**0.0**
Appropriated		
AA1000-A General Fund (Appropriated)	0.0	0.0
	0.0	**0.0**
Fund Source Total	**0.0**	**0.0**
Travel In-State	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Travel Out of State	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Food	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Aid to Organizations and Individuals	38.0	39.0
Expenditure Category Total	**38.0**	**39.0**
Appropriated		
AA1000-A General Fund (Appropriated)	35.0	35.0
	35.0	**35.0**
Non-Appropriated		
HI2025-N Donations Fund (Non-Appropriated)	3.0	4.0
	3.0	**4.0**
Fund Source Total	**38.0**	**39.0**

Other Operating Expenses		1.0
Other Operating Expenditures Budg Approp	0.0	
Other Operating Expenditures Excluded from Cost Allocati	0.0	
Risk Management Charges To State Agency	0.0	
Risk Management Deductible - Indemnity	0.0	
Risk Management Deductible - Legal	0.0	
Risk Management Deductible - Medical	0.0	
Risk Management Deductible - Other	0.0	
Gen Liab- Non Physical-Taxable- Self Ins	0.0	
Gross Proceeds Payments To Attorneys	0.0	
General Liability- Non-Taxable- Self Ins	0.0	
Medical Malpractice - Self-Insured	0.0	
Automobile Liability - Self Insured	0.0	
General Property Damage - Self- Insured	0.0	
Automobile Physical Damage-Self Insured	0.0	
Liability Insurance Premiums	0.0	
Property Insurance Premiums	0.0	
Workers Compensation Benefit Payments	0.0	
Self Insurance - Administrative Fees	0.0	
Self Insurance - Premiums	0.0	
Self Insurance - Claim Payments	0.0	
Self Insurance - Pharmacy Claims	0.0	
Premium Tax On Altcs	0.0	
Other Insurance-Related Charges	0.0	

Program Expenditure Schedule

Agency:	**Arizona Historical Society**
Program:	**SLI Field Services and Grants**

	FY 2022 Actual	FY 2023 Expd. Plan
Internal Service Data Processing	0.0	
Internal Service Data Proc- Pc/Lan	0.0	
External Programming-Mainframe/Legacy	0.0	
External Programming- Pc/Lan/Serv/Web	0.0	
External Data Entry	0.0	
Othr External Data Proc-Mainframe/Legacy	0.0	
Othr External Data Proc-Pc/Lan/Serv/Web	0.0	
Pmt for AFIS Development & Usage	0.0	
Internal Service Telecommunications	0.0	
External Telecom Long Distance-In-State	0.0	
External Telecom Long Distance-Out-State	0.0	
Other External Telecommunication Service	0.0	
Electricity	0.0	
Sanitation Waste Disposal	0.0	
Water	0.0	
Gas And Fuel Oil For Buildings	0.0	
Other Utilities	0.0	
Building Rent Charges To State Agencies	0.0	
Priv Lease To Own Bld Rent Chrgs To Agy	0.0	
Cert Of Part Bld Rent Chrgs To Agy	0.0	
Rental Of Land And Buildings	0.0	
Rental Of Computer Equipment	0.0	
Rental Of Other Machinery And Equipment	0.0	
Miscellaneous Rent	0.0	
Interest On Overdue Payments	0.0	
All Other Interest Payments	0.0	
Internal Acct/Budg/Financial Svcs	0.0	
Other Internal Services	0.0	
Repair And Maintenance - Buildings	0.0	
Repair And Maintenance - Vehicles	0.0	
Repair And Maint - Mainframe And Legacy	0.0	
Repair And Maint-Pc/Lan/Serv/Web	0.0	
Repair And Maintenance - Other Equipment	0.0	
Other Repair And Maintenance	0.0	
Software Support And Maintenance	0.0	
Uniforms	0.0	
Inmate Clothing	0.0	
Security Supplies	0.0	
Office Supplies	0.0	
Computer Supplies	0.0	
Housekeeping Supplies	0.0	
Bedding And Bath Supplies	0.0	
Drugs And Medicine Supplies	0.0	
Medical Supplies	0.0	
Dental Supplies	0.0	
Automotive And Transportation Fuels	0.0	
Automotive Lubricants And Supplies	0.0	
Rpr And Maint Supplies-Not Auto Or Build	0.0	
Repair And Maintenance Supplies-Building	0.0	
Other Operating Supplies	0.0	
Publications	0.0	

Program Expenditure Schedule

Agency:	**Arizona Historical Society**
Program:	**SLI Field Services and Grants**

	FY 2022 Actual	FY 2023 Expd. Plan
Aggregate Withheld Or Paid Commissions	0.0	
Lottery Prizes	0.0	
Lottery Distribution Costs	0.0	
Material for Further Processing	0.0	
Other Resale Supplies	0.0	
Loss On Sales Of Capital Assets	0.0	
Loss on Sales of Investments	0.0	
Employee Tuition Reimbursement-Graduate	0.0	
Employee Tuition Reimb Under-Grad/Other	0.0	
Conference Registration-Attendance Fees	0.0	
Other Education And Training Costs	0.0	
Advertising	0.0	
Sponsorships	0.0	
Internal Printing	0.0	
External Printing	0.0	
Photography	0.0	
Postage And Delivery	0.0	
Document shredding and Destruction Services	0.0	
Translation and Sign Language Services	0.0	
Distribution To State Universities	0.0	
Other Intrastate Distributions	0.0	
Awards	0.0	
Entertainment And Promotional Items	0.0	
Dues	0.0	
Books- Subscriptions And Publications	0.0	
Costs For Digital Image Or Microfilm	0.0	
Revolving Fund Advances	0.0	
Credit Card Fees Over Approved Limit	0.0	
Relief Bill Expenditures	0.0	
Surplus Property Distr To State Agencies	0.0	
Security Services	0.0	
Judgments - Damages	0.0	
ICA Payments to Claimants Confidential	0.0	
Jdgmnt-Confidential Restitution To Indiv	0.0	
Judgments - Non-Confidential Restitution	0.0	
Judgments - Punitive And Compensatory	0.0	
Pmts Made to Resolve/Disputes/Avoid Costs of Litigation	0.0	
Pmts For Contracted State Inmate Labor	0.0	
Payments To State Inmates	0.0	
Bad Debt Expense	0.0	
Interview Expense	0.0	
Employee Relocations-Nontaxable	0.0	
Employee Relocations-Taxable	0.0	
Non-Confidential Invest/Legal/Law Enf	0.0	
Conf/Sensitive Invest/Legal/Undercover	0.0	
Fingerprinting, Background Checks, Etc.	0.0	
Other Miscellaneous Operating	0.0	

Program Expenditure Schedule

Agency:	**Arizona Historical Society**
Program:	**SLI Field Services and Grants**

	FY 2022 Actual	FY 2023 Expd. Plan
Expenditure Category Total	**0.0**	**1.0**
Non-Appropriated		
HI2025-N Donations Fund (Non-Appropriated)	0.0	1.0
	0.0	**1.0**
Fund Source Total	**0.0**	**1.0**

Current Year Expenditures		0.0
Capital Equipment Budget And Approp	0.0	
Vehicles Capital Purchase	0.0	
Vehicles Capital Leases	0.0	
Furniture Capital Purchase	0.0	
Depreciable Works Of Art & Hist Treas/Coll Capital Purcha	0.0	
Non Depr Works Of Art & Hist Treas/Coll Cap Purchase	0.0	
Furniture Capital Leases	0.0	
Computer Equipment Capital Purchase	0.0	
Computer Equipment Capital Lease	0.0	
Telecommunication Equip-Capital Purchase	0.0	
Telecommunication Equip-Capital Lease	0.0	
Other Equipment Capital Purchase	0.0	
Other Equipment Capital Leases	0.0	
Purchased Or Licensed Software-Website	0.0	
Internally Generated Software-Website	0.0	
Development in Progress	0.0	
Right-Of-Way/Easement/Extraction Rights	0.0	
Oth Int Assets purchased, licensed or internally generate	0.0	
Other intangible assets acquired by capital lease	0.0	
Other Capital Asset Purchases	0.0	
Leasehold Improvement-Capital Purchase	0.0	
Other Capital Asset Leases	0.0	
Non-Capital Equip Budget And Approp	0.0	
Vehicles Non-Capital Purchase	0.0	
Vehicles Non-Capital Leases	0.0	
Furniture Non-Capital Purchase	0.0	
Works Of Art And Hist Treas-Non Capital	0.0	
Furniture Non-Capital Leases	0.0	
Computer Equipment Non-Capital Purchase	0.0	
Computer Equipment Non-Capital Lease	0.0	
Telecomm Equip Non-Capital Purchase	0.0	
Telecomm Equip Non-Capital Leases	0.0	
Other Equipment Non-Capital Purchase	0.0	
Weapons Non-Capital Purchase	0.0	
Other Equipment Non-Capital Lease	0.0	
Purchased Or Licensed Software/Website	0.0	
Internally Generated Software/Website	0.0	
LICENSES AND PERMITS	0.0	
Right-Of-Way/Easement/Extraction Exp	0.0	
Other Intangible Assets - Purchased, Licensed or Internall	0.0	
Noncapital Software/Web By Capital Lease	0.0	
Other Intangible Assets Acquired by Capital Lease	0.0	
Other Long Lived Tangible Assets to be Expenses	0.0	
Non-Capital Equipment Excluded from Cost Allocation	0.0	

Program Expenditure Schedule

Agency:	**Arizona Historical Society**
Program:	**SLI Field Services and Grants**

		FY 2022 Actual	FY 2023 Expd. Plan
	Expenditure Category Total	**0.0**	**0.0**
Capital Outlay		0.0	0.0
	Expenditure Category Total	**0.0**	**0.0**
Debt Service		0.0	0.0
	Expenditure Category Total	**0.0**	**0.0**
Cost Allocation		0.0	0.0
	Expenditure Category Total	**0.0**	**0.0**
Transfers		0.0	0.0
	Expenditure Category Total	**0.0**	**0.0**

Employee Retirement Coverage

Retirement System	FTE	Personal Services	Fund#
Arizona State Retirement System	0.5	20.2	AA1000-A

Combined Regular & Elected Positions At/Above FICA Maximum of $147,000

Total FTE	Personal Services	FTE's not eligible for Health, Dental & Life
0.0	0.0	0.0

Program Expenditure Schedule

Agency:	**Arizona Historical Society**
Program:	**SLI Papago Park Museum**

	FY 2022 Actual	FY 2023 Expd. Plan
FTE	11.0	11.0
Expenditure Category Total	**11.0**	**11.0**
Appropriated		
AA1000-A General Fund (Appropriated)	8.0	8.0
	8.0	**8.0**
Non-Appropriated		
HI2900-N Permanent AZ Historical Society Revolving Fund (Non-App	3.0	3.0
	3.0	**3.0**
Fund Source Total	**11.0**	**11.0**
Personal Services	100.1	457.4
Boards and Commissions	0.0	0.0
Expenditure Category Total	**100.1**	**457.4**
Appropriated		
AA1000-A General Fund (Appropriated)	100.1	381.3
	100.1	**381.3**
Non-Appropriated		
HI2900-N Permanent AZ Historical Society Revolving Fund (Non-App	0.0	76.1
	0.0	**76.1**
Fund Source Total	**100.1**	**457.4**
Employee Related Expenses	47.7	227.6
Expenditure Category Total	**47.7**	**227.6**
Appropriated		
AA1000-A General Fund (Appropriated)	47.7	182.5
	47.7	**182.5**
Non-Appropriated		
HI2900-N Permanent AZ Historical Society Revolving Fund (Non-App	0.0	45.1
	0.0	**45.1**
Fund Source Total	**47.7**	**227.6**
Professional and Outside Services		30.5
External Prof/Outside Serv Budg And Appn	0.0	
External Investment Services	0.0	
Other External Financial Services	0.0	
Attorney General Legal Services	0.0	
External Legal Services	0.0	
External Engineer/Architect Cost - Exp	0.0	
External Engineer/Architect Cost- Cap	0.0	
Other Design	0.0	
Temporary Agency Services	4.4	
Hospital Services	0.0	
Other Medical Services	0.0	
Institutional Care	0.0	
Education And Training	0.0	
Vendor Travel	0.0	
Professional & Outside Services Excluded from Cost Alloca	0.0	
Vendor Travel - Non Reportable	0.0	
External Telecom Consulting Services	0.0	
Costs related to those in custody of the State	0.0	

Program Expenditure Schedule

Agency:	**Arizona Historical Society**
Program:	**SLI Papago Park Museum**

	FY 2022 Actual	FY 2023 Expd. Plan
Non - Confidential Specialist Fees	0.0	
Confidential Specialist Fees	0.0	
Outside Actuarial Costs	0.0	
Other Professional And Outside Services	7.0	
Expenditure Category Total	**11.4**	**30.5**
Appropriated		
AA1000-A General Fund (Appropriated)	0.0	5.0
	0.0	**5.0**
Non-Appropriated		
HI2025-N Donations Fund (Non-Appropriated)	0.0	0.5
HI2900-N Permanent AZ Historical Society Revolving Fund (Non-App	11.4	25.0
	11.4	**25.5**
Fund Source Total	**11.4**	**30.5**
Travel In-State	1.8	5.0
Expenditure Category Total	**1.8**	**5.0**
Appropriated		
AA1000-A General Fund (Appropriated)	1.8	5.0
	1.8	**5.0**
Fund Source Total	**1.8**	**5.0**
Travel Out of State	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Food	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Aid to Organizations and Individuals	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Other Operating Expenses		441.5
Other Operating Expenditures Budg Approp	0.0	
Other Operating Expenditures Excluded from Cost Allocati	0.0	
Risk Management Charges To State Agency	0.0	
Risk Management Deductible - Indemnity	0.0	
Risk Management Deductible - Legal	0.0	
Risk Management Deductible - Medical	0.0	
Risk Management Deductible - Other	0.0	
Gen Liab- Non Physical-Taxable- Self Ins	0.0	
Gross Proceeds Payments To Attorneys	0.0	
General Liability- Non-Taxable- Self Ins	0.0	
Medical Malpractice - Self-Insured	0.0	
Automobile Liability - Self Insured	0.0	
General Property Damage - Self- Insured	0.0	
Automobile Physical Damage-Self Insured	0.0	
Liability Insurance Premiums	0.0	
Property Insurance Premiums	0.0	
Workers Compensation Benefit Payments	0.0	
Self Insurance - Administrative Fees	0.0	

Program Expenditure Schedule

Agency:	**Arizona Historical Society**
Program:	**SLI Papago Park Museum**

	FY 2022 Actual	FY 2023 Expd. Plan
Self Insurance - Premiums	0.0	
Self Insurance - Claim Payments	0.0	
Self Insurance - Pharmacy Claims	0.0	
Premium Tax On Altcs	0.0	
Other Insurance-Related Charges	0.0	
Internal Service Data Processing	0.0	
Internal Service Data Proc- Pc/Lan	0.0	
External Programming-Mainframe/Legacy	0.0	
External Programming- Pc/Lan/Serv/Web	0.0	
External Data Entry	0.0	
Othr External Data Proc-Mainframe/Legacy	0.0	
Othr External Data Proc-Pc/Lan/Serv/Web	0.0	
Pmt for AFIS Development & Usage	1.8	
Internal Service Telecommunications	0.0	
External Telecom Long Distance-In-State	38.7	
External Telecom Long Distance-Out-State	0.0	
Other External Telecommunication Service	0.0	
Electricity	137.0	
Sanitation Waste Disposal	0.0	
Water	28.2	
Gas And Fuel Oil For Buildings	2.7	
Other Utilities	0.0	
Building Rent Charges To State Agencies	0.0	
Priv Lease To Own Bld Rent Chrgs To Agy	0.0	
Cert Of Part Bld Rent Chrgs To Agy	0.0	
Rental Of Land And Buildings	0.0	
Rental Of Computer Equipment	0.0	
Rental Of Other Machinery And Equipment	0.3	
Miscellaneous Rent	4.5	
Interest On Overdue Payments	0.1	
All Other Interest Payments	0.0	
Internal Acct/Budg/Financial Svcs	0.0	
Other Internal Services	0.0	
Repair And Maintenance - Buildings	73.7	
Repair And Maintenance - Vehicles	5.0	
Repair And Maint - Mainframe And Legacy	2.5	
Repair And Maint-Pc/Lan/Serv/Web	0.0	
Repair And Maintenance - Other Equipment	0.5	
Other Repair And Maintenance	14.4	
Software Support And Maintenance	0.7	
Uniforms	0.0	
Inmate Clothing	0.0	
Security Supplies	0.0	
Office Supplies	0.8	
Computer Supplies	0.0	
Housekeeping Supplies	8.0	
Bedding And Bath Supplies	0.0	
Drugs And Medicine Supplies	0.0	
Medical Supplies	0.0	
Dental Supplies	0.0	
Automotive And Transportation Fuels	0.2	

Program Expenditure Schedule

Agency:	**Arizona Historical Society**
Program:	**SLI Papago Park Museum**

	FY 2022 Actual	FY 2023 Expd. Plan
Automotive Lubricants And Supplies	0.0	
Rpr And Maint Supplies-Not Auto Or Build	0.4	
Repair And Maintenance Supplies-Building	0.9	
Other Operating Supplies	1.5	
Publications	0.4	
Aggregate Withheld Or Paid Commissions	0.0	
Lottery Prizes	0.0	
Lottery Distribution Costs	0.0	
Material for Further Processing	0.0	
Other Resale Supplies	1.7	
Loss On Sales Of Capital Assets	0.0	
Loss on Sales of Investments	0.0	
Employee Tuition Reimbursement-Graduate	0.0	
Employee Tuition Reimb Under-Grad/Other	0.0	
Conference Registration-Attendance Fees	0.4	
Other Education And Training Costs	0.0	
Advertising	0.0	
Sponsorships	0.0	
Internal Printing	0.0	
External Printing	0.0	
Photography	0.0	
Postage And Delivery	0.1	
Document shredding and Destruction Services	0.0	
Translation and Sign Language Services	0.0	
Distribution To State Universities	0.0	
Other Intrastate Distributions	0.0	
Awards	0.0	
Entertainment And Promotional Items	0.0	
Dues	0.6	
Books- Subscriptions And Publications	0.0	
Costs For Digital Image Or Microfilm	0.0	
Revolving Fund Advances	0.0	
Credit Card Fees Over Approved Limit	0.0	
Relief Bill Expenditures	0.0	
Surplus Property Distr To State Agencies	0.0	
Security Services	0.0	
Judgments - Damages	0.0	
ICA Payments to Claimants Confidential	0.0	
Jdgmnt-Confidential Restitution To Indiv	0.0	
Judgments - Non-Confidential Restitution	0.0	
Judgments - Punitive And Compensatory	0.0	
Pmts Made to Resolve/Disputes/Avoid Costs of Litigation	0.0	
Pmts For Contracted State Inmate Labor	0.0	
Payments To State Inmates	0.0	
Bad Debt Expense	0.0	
Interview Expense	0.0	
Employee Relocations-Nontaxable	0.0	
Employee Relocations-Taxable	0.0	
Non-Confidential Invest/Legal/Law Enf	0.0	
Conf/Sensitive Invest/Legal/Undercover	0.0	
Fingerprinting, Background Checks, Etc.	0.0	

Program Expenditure Schedule

Agency:	**Arizona Historical Society**
Program:	**SLI Papago Park Museum**

	FY 2022 Actual	FY 2023 Expd. Plan
Other Miscellaneous Operating	0.6	
Expenditure Category Total	**325.7**	**441.5**
Appropriated		
AA1000-A General Fund (Appropriated)	322.1	149.5
	322.1	**149.5**
Non-Appropriated		
HI2025-N Donations Fund (Non-Appropriated)	0.3	242.0
HI2900-N Permanent AZ Historical Society Revolving Fund (Non-App	3.3	50.0
	3.6	**292.0**
Fund Source Total	**325.7**	**441.5**

Current Year Expenditures		1.0
Capital Equipment Budget And Approp	0.0	
Vehicles Capital Purchase	0.0	
Vehicles Capital Leases	0.0	
Furniture Capital Purchase	0.0	
Depreciable Works Of Art & Hist Treas/Coll Capital Purcha	0.0	
Non Depr Works Of Art & Hist Treas/Coll Cap Purchase	0.0	
Furniture Capital Leases	0.0	
Computer Equipment Capital Purchase	0.0	
Computer Equipment Capital Lease	0.0	
Telecommunication Equip-Capital Purchase	0.0	
Telecommunication Equip-Capital Lease	0.0	
Other Equipment Capital Purchase	0.0	
Other Equipment Capital Leases	0.0	
Purchased Or Licensed Software-Website	0.0	
Internally Generated Software-Website	0.0	
Development in Progress	0.0	
Right-Of-Way/Easement/Extraction Rights	0.0	
Oth Int Assets purchased, licensed or internally generate	0.0	
Other intangible assets acquired by capital lease	0.0	
Other Capital Asset Purchases	0.0	
Leasehold Improvement-Capital Purchase	0.0	
Other Capital Asset Leases	0.0	
Non-Capital Equip Budget And Approp	0.0	
Vehicles Non-Capital Purchase	0.0	
Vehicles Non-Capital Leases	0.0	
Furniture Non-Capital Purchase	1.8	
Works Of Art And Hist Treas-Non Capital	0.0	
Furniture Non-Capital Leases	0.0	
Computer Equipment Non-Capital Purchase	0.0	
Computer Equipment Non-Capital Lease	0.0	
Telecomm Equip Non-Capital Purchase	0.0	
Telecomm Equip Non-Capital Leases	0.0	
Other Equipment Non-Capital Purchase	0.0	
Weapons Non-Capital Purchase	0.0	
Other Equipment Non-Capital Lease	0.0	
Purchased Or Licensed Software/Website	0.0	
Internally Generated Software/Website	0.0	
LICENSES AND PERMITS	0.0	
Right-Of-Way/Easement/Extraction Exp	0.0	

Program Expenditure Schedule

Agency:	**Arizona Historical Society**
Program:	**SLI Papago Park Museum**

	FY 2022 Actual	FY 2023 Expd. Plan
Other Intangible Assets - Purchased, Licensed or Internall	0.0	
Noncapital Software/Web By Capital Lease	0.0	
Other Intangible Assets Acquired by Capital Lease	0.0	
Other Long Lived Tangible Assets to be Expenses	0.0	
Non-Capital Equipment Excluded from Cost Allocation	0.0	
Expenditure Category Total	**1.8**	**1.0**
Appropriated		
AA1000-A General Fund (Appropriated)	1.8	0.0
	1.8	**0.0**
Non-Appropriated		
HI2025-N Donations Fund (Non-Appropriated)	0.0	1.0
	0.0	**1.0**
Fund Source Total	**1.8**	**1.0**
Capital Outlay	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Debt Service	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Cost Allocation	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Transfers	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**

Employee Retirement Coverage

Retirement System	FTE	Personal Services	Fund#
Arizona State Retirement System	8.0	381.3	AA1000-A
Arizona State Retirement System	3.0	76.1	HI2900-N

Combined Regular & Elected Positions At/Above FICA Maximum of $147,000

Total FTE	Personal Services	FTE's not eligible for Health, Dental & Life
0.0	0.0	0.0

Program Expenditure Schedule

Agency:	**Arizona Historical Society**
Program:	**SLI FY 2023 Salary Increase**

	FY 2022 Actual	FY 2023 Expd. Plan
FTE	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Appropriated		
AA1000-A General Fund (Appropriated)	0.0	0.0
	0.0	**0.0**
Non-Appropriated		
HI2900-N Permanent AZ Historical Society Revolving Fund (Non-App	0.0	0.0
	0.0	**0.0**
Fund Source Total	**0.0**	**0.0**
Personal Services	0.0	0.0
Boards and Commissions	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Appropriated		
AA1000-A General Fund (Appropriated)	0.0	0.0
	0.0	**0.0**
Fund Source Total	**0.0**	**0.0**
Employee Related Expenses	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Appropriated		
AA1000-A General Fund (Appropriated)	0.0	0.0
	0.0	**0.0**
Fund Source Total	**0.0**	**0.0**
Professional and Outside Services		0.0
External Prof/Outside Serv Budg And Appn	0.0	
External Investment Services	0.0	
Other External Financial Services	0.0	
Attorney General Legal Services	0.0	
External Legal Services	0.0	
External Engineer/Architect Cost - Exp	0.0	
External Engineer/Architect Cost- Cap	0.0	
Other Design	0.0	
Temporary Agency Services	0.0	
Hospital Services	0.0	
Other Medical Services	0.0	
Institutional Care	0.0	
Education And Training	0.0	
Vendor Travel	0.0	
Professional & Outside Services Excluded from Cost Alloca	0.0	
Vendor Travel - Non Reportable	0.0	
External Telecom Consulting Services	0.0	
Costs related to those in custody of the State	0.0	
Non - Confidential Specialist Fees	0.0	
Confidential Specialist Fees	0.0	
Outside Actuarial Costs	0.0	
Other Professional And Outside Services	0.0	
Expenditure Category Total	**0.0**	**0.0**

Program Expenditure Schedule

Agency:	**Arizona Historical Society**
Program:	**SLI FY 2023 Salary Increase**

	FY 2022 Actual	FY 2023 Expd. Plan
Travel In-State	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Travel Out of State	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Food	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Aid to Organizations and Individuals	0.0	0.0
Expenditure Category Total	**0.0**	**0.0**
Other Operating Expenses		0.0
Other Operating Expenditures Budg Approp	0.0	
Other Operating Expenditures Excluded from Cost Allocati	0.0	
Risk Management Charges To State Agency	0.0	
Risk Management Deductible - Indemnity	0.0	
Risk Management Deductible - Legal	0.0	
Risk Management Deductible - Medical	0.0	
Risk Management Deductible - Other	0.0	
Gen Liab- Non Physical-Taxable- Self Ins	0.0	
Gross Proceeds Payments To Attorneys	0.0	
General Liability- Non-Taxable- Self Ins	0.0	
Medical Malpractice - Self-Insured	0.0	
Automobile Liability - Self Insured	0.0	
General Property Damage - Self- Insured	0.0	
Automobile Physical Damage-Self Insured	0.0	
Liability Insurance Premiums	0.0	
Property Insurance Premiums	0.0	
Workers Compensation Benefit Payments	0.0	
Self Insurance - Administrative Fees	0.0	
Self Insurance - Premiums	0.0	
Self Insurance - Claim Payments	0.0	
Self Insurance - Pharmacy Claims	0.0	
Premium Tax On Altcs	0.0	
Other Insurance-Related Charges	0.0	
Internal Service Data Processing	0.0	
Internal Service Data Proc- Pc/Lan	0.0	
External Programming-Mainframe/Legacy	0.0	
External Programming- Pc/Lan/Serv/Web	0.0	
External Data Entry	0.0	
Othr External Data Proc-Mainframe/Legacy	0.0	
Othr External Data Proc-Pc/Lan/Serv/Web	0.0	
Pmt for AFIS Development & Usage	0.0	
Internal Service Telecommunications	0.0	
External Telecom Long Distance-In-State	0.0	
External Telecom Long Distance-Out-State	0.0	
Other External Telecommunication Service	0.0	
Electricity	0.0	

Program Expenditure Schedule

Agency:	**Arizona Historical Society**
Program:	**SLI FY 2023 Salary Increase**

	FY 2022 Actual	FY 2023 Expd. Plan
Sanitation Waste Disposal	0.0	
Water	0.0	
Gas And Fuel Oil For Buildings	0.0	
Other Utilities	0.0	
Building Rent Charges To State Agencies	0.0	
Priv Lease To Own Bld Rent Chrgs To Agy	0.0	
Cert Of Part Bld Rent Chrgs To Agy	0.0	
Rental Of Land And Buildings	0.0	
Rental Of Computer Equipment	0.0	
Rental Of Other Machinery And Equipment	0.0	
Miscellaneous Rent	0.0	
Interest On Overdue Payments	0.0	
All Other Interest Payments	0.0	
Internal Acct/Budg/Financial Svcs	0.0	
Other Internal Services	0.0	
Repair And Maintenance - Buildings	0.0	
Repair And Maintenance - Vehicles	0.0	
Repair And Maint - Mainframe And Legacy	0.0	
Repair And Maint-Pc/Lan/Serv/Web	0.0	
Repair And Maintenance - Other Equipment	0.0	
Other Repair And Maintenance	0.0	
Software Support And Maintenance	0.0	
Uniforms	0.0	
Inmate Clothing	0.0	
Security Supplies	0.0	
Office Supplies	0.0	
Computer Supplies	0.0	
Housekeeping Supplies	0.0	
Bedding And Bath Supplies	0.0	
Drugs And Medicine Supplies	0.0	
Medical Supplies	0.0	
Dental Supplies	0.0	
Automotive And Transportation Fuels	0.0	
Automotive Lubricants And Supplies	0.0	
Rpr And Maint Supplies-Not Auto Or Build	0.0	
Repair And Maintenance Supplies-Building	0.0	
Other Operating Supplies	0.0	
Publications	0.0	
Aggregate Withheld Or Paid Commissions	0.0	
Lottery Prizes	0.0	
Lottery Distribution Costs	0.0	
Material for Further Processing	0.0	
Other Resale Supplies	0.0	
Loss On Sales Of Capital Assets	0.0	
Loss on Sales of Investments	0.0	
Employee Tuition Reimbursement-Graduate	0.0	
Employee Tuition Reimb Under-Grad/Other	0.0	
Conference Registration-Attendance Fees	0.0	
Other Education And Training Costs	0.0	
Advertising	0.0	
Sponsorships	0.0	

Program Expenditure Schedule

Agency:	**Arizona Historical Society**
Program:	**SLI FY 2023 Salary Increase**

	FY 2022 Actual	FY 2023 Expd. Plan
Internal Printing	0.0	
External Printing	0.0	
Photography	0.0	
Postage And Delivery	0.0	
Document shredding and Destruction Services	0.0	
Translation and Sign Language Services	0.0	
Distribution To State Universities	0.0	
Other Intrastate Distributions	0.0	
Awards	0.0	
Entertainment And Promotional Items	0.0	
Dues	0.0	
Books- Subscriptions And Publications	0.0	
Costs For Digital Image Or Microfilm	0.0	
Revolving Fund Advances	0.0	
Credit Card Fees Over Approved Limit	0.0	
Relief Bill Expenditures	0.0	
Surplus Property Distr To State Agencies	0.0	
Security Services	0.0	
Judgments - Damages	0.0	
ICA Payments to Claimants Confidential	0.0	
Jdgmnt-Confidential Restitution To Indiv	0.0	
Judgments - Non-Confidential Restitution	0.0	
Judgments - Punitive And Compensatory	0.0	
Pmts Made to Resolve/Disputes/Avoid Costs of Litigation	0.0	
Pmts For Contracted State Inmate Labor	0.0	
Payments To State Inmates	0.0	
Bad Debt Expense	0.0	
Interview Expense	0.0	
Employee Relocations-Nontaxable	0.0	
Employee Relocations-Taxable	0.0	
Non-Confidential Invest/Legal/Law Enf	0.0	
Conf/Sensitive Invest/Legal/Undercover	0.0	
Fingerprinting, Background Checks, Etc.	0.0	
Other Miscellaneous Operating	0.0	
Expenditure Category Total	**0.0**	**0.0**

Current Year Expenditures		0.0
Capital Equipment Budget And Approp	0.0	
Vehicles Capital Purchase	0.0	
Vehicles Capital Leases	0.0	
Furniture Capital Purchase	0.0	
Depreciable Works Of Art & Hist Treas/Coll Capital Purcha	0.0	
Non Depr Works Of Art & Hist Treas/Coll Cap Purchase	0.0	
Furniture Capital Leases	0.0	
Computer Equipment Capital Purchase	0.0	
Computer Equipment Capital Lease	0.0	
Telecommunication Equip-Capital Purchase	0.0	
Telecommunication Equip-Capital Lease	0.0	
Other Equipment Capital Purchase	0.0	
Other Equipment Capital Leases	0.0	

Program Expenditure Schedule

Agency:	**Arizona Historical Society**
Program:	**SLI FY 2023 Salary Increase**

		FY 2022 Actual	FY 2023 Expd. Plan
Purchased Or Licensed Software-Website		0.0	
Internally Generated Software-Website		0.0	
Development in Progress		0.0	
Right-Of-Way/Easement/Extraction Rights		0.0	
Oth Int Assets purchased, licensed or internally generate		0.0	
Other intangible assets acquired by capital lease		0.0	
Other Capital Asset Purchases		0.0	
Leasehold Improvement-Capital Purchase		0.0	
Other Capital Asset Leases		0.0	
Non-Capital Equip Budget And Approp		0.0	
Vehicles Non-Capital Purchase		0.0	
Vehicles Non-Capital Leases		0.0	
Furniture Non-Capital Purchase		0.0	
Works Of Art And Hist Treas-Non Capital		0.0	
Furniture Non-Capital Leases		0.0	
Computer Equipment Non-Capital Purchase		0.0	
Computer Equipment Non-Capital Lease		0.0	
Telecomm Equip Non-Capital Purchase		0.0	
Telecomm Equip Non-Capital Leases		0.0	
Other Equipment Non-Capital Purchase		0.0	
Weapons Non-Capital Purchase		0.0	
Other Equipment Non-Capital Lease		0.0	
Purchased Or Licensed Software/Website		0.0	
Internally Generated Software/Website		0.0	
LICENSES AND PERMITS		0.0	
Right-Of-Way/Easement/Extraction Exp		0.0	
Other Intangible Assets - Purchased, Licensed or Internall		0.0	
Noncapital Software/Web By Capital Lease		0.0	
Other Intangible Assets Acquired by Capital Lease		0.0	
Other Long Lived Tangible Assets to be Expenses		0.0	
Non-Capital Equipment Excluded from Cost Allocation		0.0	
	Expenditure Category Total	**0.0**	**0.0**
Capital Outlay		0.0	0.0
	Expenditure Category Total	**0.0**	**0.0**
Debt Service		0.0	0.0
	Expenditure Category Total	**0.0**	**0.0**
Cost Allocation		0.0	0.0
	Expenditure Category Total	**0.0**	**0.0**
Transfers		0.0	0.0
	Expenditure Category Total	**0.0**	**0.0**

Employee Retirement Coverage

Retirement System	FTE	Personal Services	Fund#
Arizona State Retirement System	0.0	0.0	AA1000-A

Program Expenditure Schedule

Agency:	**Arizona Historical Society**
Program:	**SLI FY 2023 Salary Increase**

	FY 2022 Actual	FY 2023 Expd. Plan

Administrative Costs

Agency: **Arizona Historical Society**

Administrative Costs Summary

Common Administrative Area	FY 2023
Personal Services	0.0
ERE	0.0
All Other	0.0
Administrative Costs Total:	0.0

Administrative Cost / Total Expenditure Ratio

	Request	Admin %
FY 2023	4,732.9	0.0%

ARIZONA HISTORICAL SOCIETY

FLAGSTAFF | TEMPE | TUCSON | YUMA

Budget Narrative

Updated FY23 Budget

July 1, 2022 Staff Salary Increase

Due to Executive-led changes in staff salaries beginning on July 1, 2022, the FY23 budget originally submitted in Fall 2021 has been subject to necessary updates. Through the $198,600 provided toward this effort through Governor Ducey's 10% staff salary increase as well as another $110,100 in appropriated support for FY23, AHS was able to make significant steps in addressing long-standing staff retention and recruitment issues. While both contributions had the impact of adding $308,700 in appropriated funds to the AHS' FY23 budget, they obligated additional costs which grew the Society's overall budget deficit – despite significant internal adjustments to both AHS' anticipated revenue for the year and its planned expenses.

This is owed to the nature of those staff positions which qualified for the 10% increase and those omitted due to then-current vacancies at the time of its implementation. At the time of its implementation, only 34 of AHS' 49 headcount positions (**69%**) were filled and qualified for the additional state appropriations support. As a result of this difference between an institutional, staff-wide increase and that provided through the state's appropriated support – and to maintain equity between similarly classified positions – AHS was obligated to incur additional and unexpected costs to cover the remainder. In total, this amounted to a financial liability of $286,540 by AHS to fully resolve the salary increase (personnel services and ERE) process started by the Governor in July.

Revenue

To address this added cost, AHS has re-evaluated its revenue potential for FY23. A total of $143,240 was added as projected revenue, divided between an increase in grant-generated funds, private donations, and event rentals. Expectations for these first two funding categories are supported by the recent hiring of a new Grants Coordinator and its first-time hire of a Development Director at the end of FY22 and beginning of FY23, respectively. Revenue generated from admissions and sales revenue were excluded from consideration in this update, as AHS maintains a cautionary stance to reflect current industry projections for a slow and ongoing recovery.[2]

Expenses

AHS further reduced this increased liability through sweeping cuts to its operating expenses. An additional $96,679 was cut from operating expenses, notably in the categories of repair/maintenance ($52,000 or 22%), printing and photography ($18,489 or 24%), and operating supplies ($5,000 or 15%).

[2]American Alliance of Museums (AAM). *National Museums Survey from December 8, 2021 to January 20, 2022*, 2-28-22 https://www.aam-us.org/2022/02/08/national-snapshot-of-covid-19-impact-on-united-states-museums-fielded-december-2021-january-2022

Deficit

Upon its approval in fall 2021, the FY23 budget was already designed with a year-end deficit of $142,173. The projected revenue increases and cuts to expenses that have now been implemented were already being planned in April 2022[3] to address this original sum and develop a neutral budget for FY23. These updates would have eliminated the deficit and provided excess funds for minor institutional growth ($97,746).

The added expenses incurred in response to the July 2022 staff salary increase have resulted in an updated FY23 annual budget that now operates with an increased estimated deficit of **$159,985**. Payroll (personnel services and ERE) accounts for 71% of AHS' expenses and still leaves 4 (**8%**) of its headcount positions completely unfunded.[4] It is currently operating in an overburdened state, with many staff filling double duties and drastically exceeding Regular Pay hours with an average 10-12 additional hours worked as Excluded Employees Extra (EEE). AHS lacks the flexibility among its remaining 29% in funding for all other operations to address this deficit or institutional need.

At its most recent meeting of the AHS State Board of Directors on July 29, 2022,[5] this updated deficit budget was reviewed and approved. In order to ensure continuity of operations across the current fiscal year, the Board took the drastic step to approve the use of non-appropriated Operational Reserves to cover the difference, whilst recognizing the limited solution provided by this option to address longer-term and future annual budgetary shortfalls.

Summation

This updated budget for FY23 now serves as the template for the Arizona Historical Society's FY24 submission, with the added request for state support to address this newly-created deficit in the coming year.

[3] AHS Executive Committee. Meeting Minutes, 4-25-22
https://arizonahistoricalsociety.org/wp-content/uploads/2022/05/Minutes-Executive-Committee-Meeting-4-25-22.pdf
[4] Although included in AHS' headcount, the Development Director is being temporarily funded as a one-year position through a restricted donation.
[5] AHS State Board. Meeting Minutes, 7-29-22
https://arizonahistoricalsociety.org/wp-content/uploads/2022/08/DRAFT-Minutes-State-Board-Meeting-7-29-22-2.pdf

Challenges and Needs for FY24

Budget Deficits and Operational Reserves

Prior to 2018, the Arizona Historical Society was perhaps best known and most infamous among the Executive and Legislature for its poor financial management practices. Annual deficits were the norm, not the outlier, and not enough was being done to reconcile this except through the use of non-appropriated funds and reserves. Five years ago, this policy had severely depleted AHS reserves and a change in course was required. Budgets were made balanced through significant budgetary cuts and increased campaigns to generate Enterprise funds. As a result of these measures, and the success of several key donations and awarded Federal grants, AHS was able to reach a balanced budget across its last several years – despite its temporary closure and lingering financial impact in 2020-2021. The success of two, one-time grants in this period, PPP and SVOG, resulted in the first-time creation of a true operational reserve of non-appropriated funds that carried over between years. AHS has been diligent in the management of these funds, which currently stand nearly at the equivalent of one years' operating cost.

In recognition of the advice and guidance provided by the 2013 Sunset Review (discussed below), AHS is now in early stages to work with the GAO to define and restrict these funds – not as budgetary surplus, but as part of a Strategic Plan for investment and long-term sustainability. On July 29, 2022,[6] the AHS Board gave its approval to reconcile its planned FY23 deficit with a small portion of these funds, but only as a limited and emergency solution. Looking ahead to FY24 and beyond, AHS strongly advocates that these funds not be considered as the go-to source for budgetary deficits, not at least until its development plans are permitted to come to fruition beginning in 2028 (AHS Capital Campaign estimated date-of-completion).

Prior to the July update to its FY23 budget, AHS had taken steps in April 2022 to address the deficit present in its original (submitted 2021) FY23 budget.[7] The budgetary cuts and increased projections to revenue discussed in the section above were that initial solution. Unfortunately, with the new burden placed on AHS to cover salary increases for all staff positions not covered by the July increase, this deficit was reborn and now stands at **$159,985** for FY23. Planning for FY24, AHS has proposed a baseline increase which further raises that deficit to **$181,300**. This $21,315 increase provides a modest, 1-3% cost of living adjustment to 25% of AHS' staff, moves one position from part-time (32 hours) to full-time (40), and responds to announced increases to the minimum wage by select Arizona cities and towns in 2023. No other changes are proposed for the FY24 budget, and all cuts and planned revenue increases made in the FY23 budget remain in effect.

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[6] AHS State Board. Meeting Minutes, 7-29-22
https://arizonahistoricalsociety.org/wp-content/uploads/2022/08/DRAFT-Minutes-State-Board-Meeting-7-29-22-2.pdf
[7] AHS Executive Committee. Meeting Minutes, 4-25-22
https://arizonahistoricalsociety.org/wp-content/uploads/2022/05/Minutes-Executive-Committee-Meeting-4-25-22.pdf

AHS requests the State of Arizona's support to address this newly-created deficit in the coming FY24 year.

2013 Sunset Review Recommendations

The 2013 Sunset Review has been the guiding document behind AHS' multi-year efforts to reform itself financially and as an organization on the whole. Among its recommendations, the Sunset Review identified five key funding-related matters in need of address, specifically:

1. Declining revenue for Enterprise funds
2. Deferred facility improvements and maintenance
3. Regular exhibit refreshes
4. Collections storage issues
5. Unfilled Staff Positions

It is notable that these problems and challenges (identified on the internal pages 10-12 of the Sunset Review) persist – in often new ways and forms – in 2022. However, unlike with years previous, solutions and initiatives are now forthcoming but will take several years before coming to fruition. The ensuing section provides AHS' response and plans to provide a sustainable solution to these matters.

2013 Sunset Review Resolution

Declining revenue for Enterprise funds

The financial impact of 2020 and 2021 is anticipated to linger in FY23 and FY24 through the uneven return of visitors and patrons. Total revenue from admissions, sales, and program revenue in FY22 has grown 160% from FY21.[8] However, it is still down 67% from FY19.[9] Other revenue-generating programs, such as rental income, have nearly recovered to their pre-2020 levels. For FY23 and beyond, AHS has reconciled this annual estimated loss of $255,110 in visitation-based revenue from pre-2020 levels through a renewed focus on Grants and Development.

The hiring of a new Grants Coordinator in May 2022 came at the onset of the summer grant cycle, with the expectation of successful applications in support of the Society's operations. The updated FY23 budget estimated $50,000 in Federal and State grant support and $35,000 in private grants. To-date, AHS is over halfway toward meeting the former, and submitted its first $400,000 grant in the FY23 cycle in August 2022. Unfortunately, with the exception of the 2020-2021 PPP and SVOG grants, many higher-value grants do not provide general operating support. They are instead designed for one-time initiatives, such as new exhibits, facility improvements, or collections

[8] $120,775 in FY21 and $196,784 in FY22.
[9] $451,894 in FY19 and $196,784 in FY22.

storage updates. While these initiatives are designed to inspire new public engagement and revenue generation in the long term, they are often multi-year in their implementation and still require funding on the back-end for general operations support.

In August 2022, AHS hired its first Development Director. This position was one of those recommendations provided by the 2013 Sunset Review, and is being funded for a one-year period through a restricted donation received in 2020. This position is expected to become self-funding within the first year and provide a long-term plan to develop key stakeholder support across the state. Revenue generated from these efforts is anticipated to support AHS' restricted funds in support of initiatives that exceed annual budget allocations.

As a separate element of Development, AHS is in Phase II of its 7-year plan to operate a $100 million Capital Campaign. In 2020, AHS received the legacy gift of a home in Paradise Valley. The sale of that property provided nearly $1.7 million to support the Society's operations as general reserves. By a vote of the AHS State Board on October 23, 2020,[10] the proceeds were designated as restricted funds to develop and operate a Capital Campaign. This determination followed the guidance provided by the 2013 Sunset Review. In 2021, AHS completed a Phase I Feasibility Study through a procured contract with the AHS Support Group "Friends of Arizona Historical Society" and Phoenix Philanthropy. In September 2022, AHS has finalized an RFP with State Procurement and is preparing to go to bid to conduct Phases II and III – Readiness and Operations. This Campaign is estimated to end in 2028 with an anticipated principal of $100 million. The interest and dividends from its management will thereafter serve as a significant source of non-appropriated funds for annual operations, including:

1. Staff Payroll
2. Collections and Archives Management
3. Permanent Exhibits Renovation
4. Historic sites maintenance and care
5. Community Events and Promotions
6. Advertising

Across these efforts, AHS demonstrates its commitment and Strategic vision for financial development and sustainability. An unfortunate combination of the just-nascent Grants and Development programs and the continued loss of generated revenue continues to put AHS below its previously-realized performance expectations. A full recovery and beyond is expected, through the gradual return of lost visitation revenue and future-looking nature of Grants and Development suggest several additional years of operational losses prior to sustainability at current levels.

In the interim, AHS seeks the continued and increased support of the State of Arizona for its annual operations in order to offset these loss estimates.

[10] AHS State Board. Meeting Minutes, 10-23-20
https://arizonahistoricalsociety.org/wp-content/uploads/2020/10/Minutes_October-23-2020_DRAFT-1.pdf

Deferred facility improvements and maintenance

The Arizona Historical Society maintains 4 museums across the State of Arizona, in Tempe/Phoenix, Tucson, Yuma, and Flagstaff. In addition, it stewards 4 historic sites in Tucson, Strawberry, and Douglas. AHS further supports 23 historical societies and facilities through its Certified Historical Institutions program.

The 2013 Sunset Review identified a conflict between funding needs and funding availability in AHS' care of these facilities and sites. The original FY23 budget submission from 2021 allocated $242,260 towards repair and maintenance. To offset the increases to payroll, this allocation was cut by **22%** to $190,260. This provides less than $50,000 in annual maintenance for each of AHS' 8 owned and stewarded properties. The variable sizes and needs of each building and site require individual – and costly – solutions. Pioneer Museum is an 1908 hospital that includes sprawling grounds pocketed with historic barns and cabins. Sanguinetti Museum and Gardens is a 19th century adobe home and property. The Arizona Heritage Center (AHC) in Tempe is a massive 85,000 square foot facility that, although new by comparison, faces long-deferred maintenance across its many systems. To date, AHS has managed the annual maintenance and upkeep of its properties with the funds provided. However, larger preventative and preservation-based initiatives – e.g. **$1.28 million** in restorations at the Sosa-Carrillo House[11] – remain unanswered without additional Capital funding.

In answer to this, AHS continues to submit its annual Capital Improvement Plan (CIP) at the conclusion of each fiscal year. The total funding package requested often approaches AHS' total annual budget, and has never been fully addressed. For multiple years, essential improvements for safety and general operations have been deferred and unanswered by CIP, such as the repair or replacement of an archival freezer containing nitrate film. This film is capable of spontaneous combustion above a temperature of 100 degrees – a temperature not foreign to central and southern Arizona. Most recently, AHS has been proactive in its conversations with ADOA and, in FY23, a total of **$1.5 million** was awarded through CIP to address many of these most-urgent maintenance issues. The freezer was not included in this awards list, but an alternate funding path has been developed by AHS for its resolution in FY23.

Many other facilities' needs, however, remain deferred and will require several more years of matching CIP support or greater to fully resolve.

The Arizona History Museum (AHM) in Tucson presents an unique and terminal problem, as in 31 years (2053) its lease of the property on which half the museum resides expires. The facilitating lease agreement extends from 1954 with the University of Arizona (UA) for 99 years, but it has been signaled by UA that it intends to terminate the lease at that time. The resulting action will obligate AHS to sell its portion of the land on which the museum sits and relocate to an alternate facility; the current museum is most likely intended for demolition for new construction. A 2005 appraisal of the Tucson property assigned it a market value of **$9.2 million**.[12] That valuation has grown in the ensuing 17 years

[11] Swaim Associates. *Restoration Assessment and Statement of Probable Cost*, 5-16-22. See attached.
[12] Southwest Appraisal Associates, Inc. *Complete Appraisal Summary Report*, 9-19-05. See attached.

and, while the eventual sale value of the property will provide much-needed capital for a relocation, the ever-diminishing availability of space in Tucson will place any qualifying location of comparable size at a premium. To be considered in the true cost of the move must also be the land/building purchase price, construction and renovation costs to meet archival standards (climate control, HVAC, dry sprinkler systems, etc), and the costs to develop and install new permanent exhibits (replacing those incapable of being relocated). AHS recognizes this looming crisis and is updating its Strategic Plan to provide a clear path forward. The assignment of reserve funds and development-driven donations represents the most viable solution available at this time. AHS has also considered the increased valuation for an early termination of the lease and sale to UA, and a review of other, vacated State buildings in Tucson. It is exploring all options to provide an expedient but balanced vision and resolution for this looming challenge.

Regular Exhibit Refreshes

The 2013 Sunset Review correctly identified the connection between fresh exhibition content and visitation. AHS shares this priority and has implemented a three-tiered approach in its resolution: pop-up exhibits, temporary exhibits, and permanent exhibits. Beginning in FY22, AHS has implemented a practice of "pop-up" exhibits. This style of temporary exhibits is rapid and minimal in its development, establishing a permanent rotation that seeks to simply display and celebrate the vast stores of AHS' curated collections. These pop-up exhibits rotate through AHS' two largest museums – AHC, Tempe and AHM, Tucson – every 3 months.

Temporary exhibitions at AHS occur every 6 months, rotating between AHS' Pioneer Museum, AHC, and AHM. These exhibits provide a deeper exploration of selected themes or subjects within Arizona's history, combining artifacts with dynamic content and engaging interactives. Since the start of the 2022 calendar year, AHS has unveiled 5 new temporary exhibits at AHC, Tempe and AHM, Tucson – Ready to Launch (AHM), Los Desconocidos (AHM), On Air (AHC), the Covid Memorial Quilt (AHC), Summertime at Big Surf (AHC), and Climates of Inequality (AHC). This ever-changing slate of new exhibit content is intended to inspire frequent and repeated visitation to further visitation revenue, and may be reflected in the increase to FY22 visitation revenue. AHS continues to explore grant funding to further improve the quality and depth of its rotating exhibit content.

The permanent exhibition spaces at AHC, Tempe and AHM, Tucson present a larger challenge. These displays were specifically identified as problematic within the Sunset Review, alongside the recommendation to contract for services when beyond the Society's expertise. Both sets of permanent exhibits combined occupy nearly 70,000 square feet of space. The exhibits currently occupying the permanent galleries at AHC and AHM were old and worn in 2013, and no longer reflect the interests and needs of AHS' visitors. The very nature of their design is out of date: AHC still employs bulb televisions in its displays. They are incompatible with those modern technologies and industry pedagogies which otherwise inspire active engagement and enjoyment by guests. As an organization defined by the strength of its exhibits, those currently on permanent display reveal an organization that is dated in its content and methods. At the

minimum, an estimated $10-15 million will be required to implement a complete redesign and install of both exhibit spaces. AHS looks to generate the support necessary for this effort over the next 5-10 years.

This will be accomplished, in part, through the work of its Development Director, grant applications, the Capital Campaign, and those investment funds proposed to be reallocated from reserves to restricted.

Collections Storage Issues

The Library and Archives (LAC) of the Arizona Historical Society are its most prominent and effective department. This is owed to the strength of its holdings, which encompass rare films and audio recordings, architectural drawings of old Arizona, memoirs and personal libraries, glass slides, postcards, original reels from Arizona news stations, and much more. AHS has been proud to assist its Governor's Liaison in all inquiries and information requests submitted across FY22, supporting such campaigns as the Capitol's Copper Dome project. Most recently, these holdings have continued to grow with the ongoing closure of other public and private archives and museums across the state.

This has created a continuous intake of new and significant collections, including from the likes of the Arizona Department of Mines, Phoenix Mining Museum, and Valley National Bank. AHS is currently in talks to absorb the archives of the Phoenix Museum of History, Phelps Dodge/Freemont McMoran, and the Arizona branch of the American Institute of Architects. AHS has further increased its activities within LAC through its assumption of state-mandated records retention via new Microfilm Processing Services. This new activity resolves a gap in statewide inter-agency support services following the termination of microfilm processing by the State Library and Archives in 2017-2018. This new service within LAC supports not only other state agencies but has been expanded to serve private businesses as a revenue-generating activity, netting over $30,000 in FY22.

AHS Collections comprise one of the largest catalogs of public artifacts within the State of Arizona. Materials cover the history of the state, spanning its Territorial Pioneer Days through to the social and political movements of today which inspire the next chapter of Arizona history. Across its 158 years of existence, these material holdings have grown in their size and scope to describe 82,000 objects and 12,000 linear feet of archives. Storage capacity, first identified in 2013, is approaching a critical mass. To address this challenge, AHS initiated a multi-year review of collections in 2019 for the purposes of deaccessioning. Within this process, objects from within collections have been systematically and individually evaluated based on the qualities of their current state of preservation, uniqueness as an artifact, provenance or special affiliations, or any additional matters of context. Items which demonstrate no connection to the State of Arizona or its people, which lack historical value, or which are too poorly deteriorated to be restored are then removed from AHS' accession record and, in order of procedure, redistributed to other departments at AHS for their use (e.g. education for hands-on learning), given to other museums/historical agencies/schools, offered to the original owner or their descendants, put up to auction, or destroyed. This course of action has resulted in AHS' successful resolution of its 2013 Sunset Review findings concerning collections care – that storage across all

four museums "were filled to near or beyond normal capacity." A consequence of not addressing this challenge is the near-total loss of new collection donations through AHS" forfeited operational capacity to accept and retain them.

Unfortunately, efforts to remove non-relevant collections from AHS' care have since been stymied by ongoing outreach from state and corporate partners for AHS to take on new assemblages. Deaccession, already a slow and deliberate process, is now insufficient to address the storage issues present among its 3D and archival collections. A more dedicated organizational restructuring is required to increase the Society's total storage capacity.

In accordance with the recommendations of the 2013 Sunset, AHS is now pursuing the acquisition and installation of high-density storage shelving units to replace its fixed metal shelving. Whereas a fixed shelving system requires a series of permanent aisles between the shelves, the shelves of a rolling unit are capable of changing their position to condense closely together and obligate only one aisle between multiple shelves. In 2021 and 2022, AHS has sought bids from regional firms specializing in the design and installation of these high-density, rolling shelf units. The most recent received would provide for a full update of all of AHC's current collections storage systems, but at the cost of **$1.49 million** as a turnkey project.[13] In 2021, AHS was nearing completion of a grant application which would have facilitated the purchase of this equipment, but the request had to be withdrawn at the final hour due to a lack of matching (1:1) funds. In its FY23, AHS plans to address this ongoing challenge through two concurrent projects: grant funding and the donation of high-density storage units through state and community surplus. In both cases, AHS would resolve to cover any required matches to grants or the costs of transportation and installation through the use of those non-appropriated, annual carryover funds to be reallocated from operational reserves to restricted funds.

Unfilled Staff Positions

In its 2013 findings, the Sunset Review identified unfilled staff positions and other staffing-related issues as significant retardants against AHS' projected or desired growth, specifically:

> The Society reported that its greatest challenge during the economic downturn has been the lack of personnel resources. In particular, the Society has been unable to fill some key museum operational positions, such as the division director position in the Southern Division, which has been vacant since December 2009. This position is responsible for overseeing operations and programming at the Society's three museums in Tucson, including the Arizona History Museum (Tucson museum) (see Introduction, page 2, for regional map of the Society's museums). Instead, the Society's executive director has taken over the division director's job duties.
>
> The Society also indicated that it does not have the budget to establish additional Information Technology (IT) positions. According to the Society, it has only one IT specialist, based at the Tempe museum, who has to commute to each of the Society's museums located throughout the State to manage servers, computers, and/or telephone equipment when the task cannot be completed remotely. To assist with IT efforts, one of the

[13] Interior Solutions. *AHS Collections & Archives Storage Proposal*, 2-24-22. See attached.

Society's museum curators is responsible for updating and maintaining several pages on the Society's Web site and troubleshooting any problems that may arise.

To compensate for some of its position vacancies, the Society uses volunteers to assist with museum operations. The Society reported on its IRS Form 990 that it used the services of 620 volunteers in various areas of its museums, including gift stores, admissions counters, and libraries in fiscal year 2012. Volunteers also assisted society staff in implementing educational programs and events.

In partial address to this, in FY22, the staffing headcount approved for AHS by the State of Arizona was increased from 47 to 49. This increase was enacted in response to ongoing agency requests for additional personnel to support and further the Society's outreach and development efforts, as well ensure continuity across the multitude of its departments' operations. FY22 was the fifth year of a 5-year cycle that traditionally sees significant personnel changes within AHS, and staff retention and recruitment became ongoing challenges. At one point in FY22, positions filled were less than half the total headcount approved. With the support provided Governor Ducey with the July 1, 2022 Staff Salary Increase, AHS was able to implement raises to a number of its positions and stem the leak at its source. As a result of the increase, the hourly rate for non-senior staff increased by an average of $1.80-$2.00.

By its nature, the 10% increase did not address all staff positions at AHS. Many forthcoming positions were omitted due to then-current vacancies at the time of its implementation. At the time of July 1, 2022, only 34 of AHS' 49 headcount positions (**69%**) were filled and qualified for the additional state appropriations support. As a result of this difference between an institutional, staff-wide increase and that provided through the state's appropriated support – and to maintain equity between similarly classified positions – AHS was obligated to incur additional and unexpected costs to cover the remainder. In total, this amounted to a financial liability of $286,540 by AHS to fully resolve the salary increase (personnel services and ERE) process started by the Governor in July.

Looking ahead to FY24, AHS has only proposed one baseline increase request: the funds necessary to cover the total added expenses incurred by the Society's match of the Governor's 10% salary increase. By FY24, this amount will have grown to $181,300, which includes the $159,985 budget deficit from FY23 with an additional $21,315 added to accommodate a limited cost-of-living update among the lowest-paid staff, an increase in hours for 1 staff member from part-time to full-time, and announced changes for 2023 in local and city minimum wages. In Flagstaff alone, the announced increase of the city's minimum wage to $17.05 by December 2023 is now $0.55 greater than the wages of at least one position and that was currently provided for under the Governor's increase. Due to the ubiquity of this role across all four of AHS' locations and to maintain equity across the organization between positions of the same duties and classification, AHS will be required to implement this increase at all its locations across the state. This $0.55 raise alone is anticipated to cost an additional $7,200 annually.

Through these efforts, retention has begun to equalize. Recruitment is ongoing, but AHS currently stands at 39 of 49 positions filled. Of those vacant, this includes its Vice President of Marketing & Communications and the Operations Manager of Pioneer Museum. With the latter, this has resulted in the temporary but ongoing closure of the Pioneer Museum since fall 2021. AHS currently maintains no staff at this location, and has been locked in an ongoing candidate search since January 2022. Staff have completed interviews on dozens of candidates and extended a

Letter of Offer on four separate occasions to desired candidates. All candidates then attempted to negotiate a higher salary and withdrew their consideration upon being told there were no additional funds to offer. The role of Operations Manager of the Pioneer Museum in Flagstaff is currently listed at $25 hourly – $5 less than the organization's Vice Presidents, who oversee staff in their respective departments on a statewide level. Even should additional funding be available for this one position, this position is listed as competitively as it can without impugning on the work and pay rate of the statewide Vice Presidents. Detrimental to this process as well is the high cost of living in the Flagstaff area, which is 15 points higher (**117**) than the average anywhere else in the state (102.2).

At this point in time AHS does not have an answer to the recruitment troubles experienced most notably in Flagstaff. It continues to hold interviews and will be updating its Position Description (PD) to better attract and retain qualified applicants. AHS is also exploring alternate models for the facility's operations, including the use of an all-volunteer staff or student internships, but these are still to be developed in concert with local partners and businesses. Currently, staff and leaders from other facilities across the state are driving up to the museum once per week to alternate monitoring and maintenance of the site. While present, AHS staff have begun to open the museum as "Public Museum Days." No admission is charged, the gift shop remains closed, and rooms remain off-limits due to the limited staffing and compliance with state regulations on cash handling practices. However, this effort has been well received by local residents as a sign of AHS' dedication to their community and commitment for a swift return.

Summation

In order to best address these issues which are multi-year in their scope or whose costs exceed annual allocations, the Executive and Finance Committees of the AHS State Board now support the investment of the majority of its operational reserves as restricted funds.[14] The 2013 Sunset Review identifies a clear need for more responsible financial practices; this guidance directly aligns with the sustainable funding priorities now proposed and being developed for AHS' operational reserves. The definition of these reserves as "restricted funds" which AHS will grow to a sustainable level via investments, endowments, and a Capital Campaign, is our answer to this need. The purpose of these funds will address those matters outlined in the 2013 Sunset Review and which exist outside the budgeting allowances of our annual operations, specifically in the categories of:

1. Matching funds for capital grants in excess of $250,000.
2. Facilities care and maintenance of State Historic Properties.
3. Anticipated facility relocations due to limited-term leases.
4. Permanent exhibit renovations in all AHS state facilities.

[14] AHS Finance Committee, Meeting Minutes 8-16-22
https://arizonahistoricalsociety.org/wp-content/uploads/2022/08/DRAFT-Minutes-Finance-Committee-Meeting-8-16-22.pdf
AHS Executive Committee, Meeting Minutes 8-22-22
https://arizonahistoricalsociety.org/wp-content/uploads/2022/08/DRAFT-Meeting-Minutes-Executive-Committee-8-22-22.pdf

Through this restriction of funds – and in coordination with the efforts of its Development Director – AHS anticipates their gradual growth and continued enrichment to emerge as a viable funding source within 5 years and a sustainable one in 10 years.[15]

Consequences and Impact

The Arizona Historical Society has taken a variety of proactive and responsive steps to ensure its compliance with state policy and guidance at all levels, and most notably within the framework of its annual budget submission process and its earlier Sunset Review. In preparation for this submission, AHS has developed a comprehensive Strategic Plan for operational investments to develop multiple pools of sustainable funding through the allocation of restricted funds, hiring of a Development Director, and anticipated launch of a Capital Campaign. Together, these initiatives are projected to provide support not only for annual operations but also those multi-year initiatives recognized by the 2013 Sunset Review which require extra-annual financial support. AHS anticipates the tentative return on these funds by 2038.

In support of its annual operating budget for FY23, AHS increased its revenue projections by $143,240 and made $96,679 in cuts to expenses. These efforts had the effect of eliminating a previously-incorporated deficit from the 2021-approved draft of the FY23 budget, and created a modest surplus to further these development goals. The July 1, 2022 staff salary increase eliminated this new surplus and restored the deficit to above its earlier level. By FY24, this deficit is expected to grow to **$181,300** while only maintaining baseline staffing expenses.

For the purposes of FY23, the AHS State Board has approved the emergency use of its operational reserves to cover the balance left by this new deficit. It requests the support of the State of Arizona to increase its baseline appropriated funds to address this increase in future years.

If not addressed by the State, this burden will continue to reside with AHS itself. The operational needs of the agency preclude layoffs, while other expenses have already been cut to their lowest rates yet. The only solution available to AHS will be to continue to draw from its operational reserves, against the advice of the 2013 Sunset Review and its Strategic Plan. This will have the negative impact of delaying its investment and development strategies, further extending its status as being only partially-funded from non-sustainable sources.

[15] At an assumed 4% growth and an annual contribution of $500,000 by the Development Director beginning in Year 2, the initial balance of ~$4.3 million will capitalize to $7.4 million in 5 years and generate in excess of $275,000 in interest and dividends. In 10 years, assuming the full investment of the equivalent of the interest generated, the fund will have reached $11.8 million and generate over $450,000 annually in interest and dividends.

ARIZONA HISTORICAL SOCIETY

FY22 STAFF BUDGET

10% STATE INCREASE

Department	Name:	State Position	Hourly	Hours	Total Weekly	Annual	10% Adjustment	Hourly Increase	Hours	Total Weekly	Annual
	ARIZONA HISTORICAL SOCIETY -- FY22										
	45/49 Headcount										
Executive Staff		HI Director - Tempe	60.0000	40	$2,400.00	$125,142.96	66.00	6.00	40	$240.00	$12,514.30
		Assistant Director (Development Director) Tucson			$0.00	$0.00	0.00	0.00	0	$0.00	$0.00
		Executive Staff Assistant	21.5000	40	$860.00	$44,842.89	0.00	0.00	0	$0.00	$0.00
		Grants Coordinator - Tempe	24.0000	40	$960.00	$50,057.18	26.40	2.40	40	$96.00	$5,005.72
		Executive Consultant I	20.0000	40	$800.00	$41,714.32	0.00	0.00	0	$0.00	$0.00
		Deputy Director	38.5336	40	$1,541.34	$80,370.15	0.00	0.00	0	$0.00	$0.00
Marketing & Communication		Admv Services Officer 4 - Tempe	37.5961	40	$1,503.84	$78,414.79	0.00	0.00	0	$0.00	$0.00
		Admin Assistant III - Tempe	18.5288	40	$741.15	$38,645.81	20.38	1.85	40	$74.11	$3,864.41
		Sales & Mktg Mgr - Tempe	24.5192	40	$980.77	$51,140.15	26.97	2.45	40	$98.07	$5,113.90
		Program Project Specialist - Tucson	16.5000	40	$660.00	$34,414.31	18.15	1.65	40	$66.00	$3,441.43
		Comm System Specialist - Tempe	22.0000	40	$880.00	$45,885.75	24.20	2.20	40	$88.00	$4,588.58
		Graphic Designer II - Tempe	18.5000	30	$555.00	$28,939.31	0.00	0.00	0	$0.00	$0.00
Finance		Admv Services Officer 4 - Tempe	30.0000	40	$1,200.00	$62,571.48	33.00	3.00	40	$120.00	$6,257.15
		Accountant 2	28.8500	40	$1,154.00	$60,172.91	0	0	0	$0.00	$0.00
		Admin Services Officer I - Tucson	19.2700	40	$770.80	$40,191.75	21.20	1.93	40	$77.08	$4,019.17
			20.0000	40	$800.00	$41,714.32	0.00	0.00	0	$0.00	$0.00
Education					$0.00	$0.00	33.00	3.00	40	$120.00	$6,257.15
		Museum Curator II - Tucson	19.0384	40	$761.54	$39,708.70	20.94	1.90	40	$76.15	$3,970.87
			16.5000	20	$330.00	$17,207.16	0.00	0.00	0	$0.00	$0.00
		Museum Educ Curator - Tempe	17.6000	40	$704.00	$36,708.60	19.36	1.76	40	$70.40	$3,670.86
		Museum Educator - Flagstaff	16.5000	20	$330.00	$17,207.16	0.00	0.00	0	$0.00	$0.00
		Museum Educator - Yuma	16.5000	20	$330.00	$17,207.16	18.15	1.65	40	$66.00	$3,441.43
Publications		HI Sr Museum Admr - Tucson	33.7400	40	$1,349.60	$70,372.06	37.11	3.37	40	$134.96	$7,037.21
		Museum Curator II - Tucson	20.0000	40	$800.00	$41,714.32	22.00	2.00	40	$80.00	$4,171.43
					$0.00	$0.00	23.10	2.10	40	$84.00	$4,380.00
					$0.00	$0.00	0.00	0.00	0	$0.00	$0.00
Guest Experience		Museum Sr Admr - Yuma	27.6179	40	$1,104.72	$57,603.10	30.38	2.76	40	$110.47	$5,760.12
		Program Specialist (Pioneer Manager) Flagstaff	20.0000	40	$800.00	$41,714.32	0.00	0.00	0	$0.00	$0.00
		Admin Assistant III - Tempe	16.7500	40	$670.00	$34,935.74	18.43	1.68	40	$67.00	$3,493.57
		Admin Assistant I - Flagstaff	15.0000	40	$600.00	$31,285.74	16.50	1.50	40	$60.00	$3,128.57
		Admin Assistant I - Tucson	15.0000	40	$600.00	$31,285.74	16.50	1.50	40	$60.00	$3,128.57
		AAI - Yuma	15.0000	40	$600.00	$31,285.74	16.50	1.50	40	$60.00	$3,128.57
Library & Archives, Collections, and Exhibits		HI Sr Museum Admr - Tempe	28.6608	40	$1,146.43	$59,778.29	31.53	2.87	40	$114.64	$5,977.83
		Archivist - Tucson	21.1750	40	$847.00	$44,165.04	23.29	2.12	40	$84.70	$4,416.50
		Archivist - Tucson	20.6250	40	$825.00	$43,017.89	22.69	2.06	40	$82.50	$4,301.79
		Archivist - Tempe	20.0000	40	$800.00	$41,714.32	22.00	2.00	40	$80.00	$4,171.43
		Archivist - Tempe	20.0000	40	$800.00	$41,714.32	22.00	2.00	40	$80.00	$4,171.43
		Museum Curator 2 - Tempe	20.0000	40	$800.00	$41,714.32	22.00	2.00	40	$80.00	$4,171.43
		Museum Registrar - Tempe	17.0000	40	$680.00	$35,457.17	0.00	0.00	40	$0.00	$0.00
		Registrar - Tucson	16.5000	40	$660.00	$34,414.31	18.15	1.65	40	$66.00	$3,441.43
		Museum Registrar - Tucson	16.6632	40	$666.53	$34,754.70	0.00	0.00	0	$0.00	$0.00
		Museum Curator 2	18.5069	40	$740.28	$38,600.14	20.36	1.85	40	$74.03	$3,860.01
		Museum Preparator I - Tucson	15.5000	40	$620.00	$32,328.60	16.50	1.00	40	$40.00	$2,085.72
		Museum Curator 3 - Tempe	20.0000	40	$800.00	$41,714.32	0.00	0.00	0	$0.00	$0.00
		Museum Preparator II - Tempe	16.5000	40	$660.00	$34,414.31	18.15	1.65	40	$66.00	$3,441.43
					$0.00	$0.00	0.00	0.00	0	$0.00	$0.00
HR & Facilities		Operations Manager	36.0576	40	$1,442.30	$75,205.91	39.66	3.61	40	$144.23	$7,520.59
		ASO 1 Tucson - HR Procure Volunteer	20.0000	40	$800.00	$41,714.32	0.00	0.00	0	$0.00	$0.00
		Physical Plant Supervisor I - Tucson	26.9200	40	$1,076.80	$56,147.47	0.00	0.00	0	$0.00	$0.00
		Building Maint. Specialist - Tucson	22.0043	40	$880.17	$45,894.72	24.20	2.20	40	$88.02	$4,589.47
		Building Maint. Specialist - Tempe	22.0043	40	$880.17	$45,894.72	24.20	2.20	40	$88.02	$4,589.47
		Custodial Crew Supv II - Tempe	15.0000	40	$600.00	$31,285.74	16.50	1.50	40	$60.00	$3,128.57

Total Payroll	**$1,867,226.00**	*Budgeted Not actual	**Total Estimated State Contribution to 10%**	**$198,600.00**
43.12% ERE	**$805,058.00**	*Budgeted Not actual	**Total Increase to FY22 Payroll (10%)**	**$156,240.15**
Total	**$2,672,284.00**	*Budgeted Not actual	**Total Increase to FY22 ERE (43.12%)**	**$67,370.75**
			Estimated State contribution to ERE (61.7% of new 10%)	**$42,359.85**
			New AHS contribution to ERE	**$25,010.90**

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ARIZONA HISTORICAL SOCIETY

FY23 STAFF BUDGET -- UPDATED

Name:	New Title	Proposed Hourly	Proposed Hours	Proposed Total Weekly	Annual
ARIZONA HISTORICAL SOCIETY -- FY23 -- Working Budget					
46/49 Headcount					
	Executive Director	66.0000	40	$2,640.00	$137,657.26
				$0.00	$0.00
	Development Director	42.0000	40	$1,680.00	$87,600.07
	Assistant to Executive Director	21.5000	40	$860.00	$44,842.89
	Grants Coordinator	26.4000	40	$1,056.00	$55,062.90
	Vice President	30.0000	40	$1,200.00	$62,571.48
	Membership Coordinator	20.3800	40	$815.20	$42,506.89
	Events Coordinator Northern-Central	26.9700	40	$1,078.80	$56,251.76
	Events Specialist: Southern	18.1500	40	$726.00	$37,855.75
	Communications Coordinator	24.2000	40	$968.00	$50,474.33
	Graphic Design & Exhibit Signage Specialist	20.0000	40	$800.00	$41,714.32
	Vice President	33.0000	40	$1,320.00	$68,828.63
	Services Coordinator	22.0000	40	$880.00	$45,885.75
	Procurement Coordinator	20.0000	40	$800.00	$41,714.32
	Vice President	33.0000	40	$1,320.00	$68,828.63
				$0.00	$0.00
	National History Day Coordinator	20.0000	32	$640.00	$33,371.46
	Education Specialist: Tempe	19.3600	40	$774.40	$40,379.46
	Education Specialist: Flagstaff	18.0000	40	$720.00	$37,542.89
	Education Specialist: Yuma	18.1500	40	$726.00	$37,855.75
	Vice President	37.1100	40	$1,484.40	$77,400.92
	Publications Editor	22.0000	40	$880.00	$45,885.75
	History Engagement Coordinator	23.1000	40	$924.00	$48,180.04
				$0.00	$0.00
	Vice President	30.3800	40	$1,215.20	$63,364.05
	Flagstaff Operations Manager Guest Experience Coordinator	25.0000	40	$1,000.00	$52,142.90
	Guest Experience Specialist: Tempe	18.4300	40	$737.20	$38,439.75
	Guest Experience Specialist: Flagstaff	16.5000	40	$660.00	$34,414.31
	Guest Experience Specialist: Tucson	16.5000	40	$660.00	$34,414.31
	Guest Experience Specialist: Yuma	16.5000	40	$660.00	$34,414.31
	Vice President	33.0000	40	$1,320.00	$68,828.63
	Archivist: Southern	23.2900	40	$931.60	$48,576.33
	Archivist: Southern	22.6900	40	$907.60	$47,324.90
	Archivist: Northern-Central	22.0000	40	$880.00	$45,885.75
	Archivist: Northern-Central	22.0000	40	$880.00	$45,885.75
	Collections Supervisor Northern-Central	22.0000	40	$880.00	$45,885.75
	Collections Specialist: Northern-Central	18.7000	32	$598.40	$31,202.31
	Collections Registrar: Southern	19.0000	40	$760.00	$39,628.60
	Collections Specialist: Southern	18.1500	32	$580.80	$30,284.60
	Exhibits Supervisor Southern	22.0000	40	$880.00	$45,885.75
	Exhibits Specialist: Southern	18.1500	40	$726.00	$37,855.75
	Exhibits Coordinator: Northern-Central	19.0000	40	$760.00	$39,628.60
	Exhibits Specialist: Northern-Central	18.1500	40	$726.00	$37,855.75
				$0.00	$0.00
	Vice President	39.6600	40	$1,586.40	$82,719.50
	Volunteer Coordinator	20.0000	40	$800.00	$41,714.32
	Facilities Coordinator	26.9200	40	$1,076.80	$56,147.47
	Facilities Specialist: Southern	24.2000	30	$726.00	$37,855.75
	Facilities Specialist: Northern-Central	21.5000	40	$860.00	$44,842.89
	Facilities Specialist: Northern-Central	17.0000	40	$680.00	$35,457.17
	Total Payroll	**1,112.0400**	**1,806.0000**	**$43,784.80**	**$2,283,066.45**
	43.12% ERE				**$984,458.25**
	Total Cost				**$3,267,524.70**

FY24 STAFF BUDGET

Name:	New Title	Proposed Hourly	Proposed Hours	Proposed Total Weekly	Annual
ARIZONA HISTORICAL SOCIETY -- FY24 DRAFT 1-- NO ERE match					
46/49 Headcount					
	Executive Director	66.0000	40	$2,640.00	$137,657.26
				$0.00	$0.00
	Development Director	42.0000	40	$1,680.00	$87,600.07
	Assistant to Executive Director	21.5000	40	$860.00	$44,842.89
	Grants Coordinator	26.4000	40	$1,056.00	$55,062.90
	Vice President	30.0000	40	$1,200.00	$62,571.48
	Membership Coordinator	21.0000	40	$840.00	$43,800.04
	Events Coordinator Northern-Central	26.9700	40	$1,078.80	$56,251.76
	Events Specialist: Southern	18.5000	40	$740.00	$38,585.75
	Communications Coordinator	24.2000	40	$968.00	$50,474.33
	Graphic Design & Exhibit Signage Specialist	20.0000	40	$800.00	$41,714.32
	Vice President	33.0000	40	$1,320.00	$68,828.63
	Services Coordinator	22.0000	40	$880.00	$45,885.75
	Procurement Coordinator	20.0000	40	$800.00	$41,714.32
	Vice President	33.0000	40	$1,320.00	$68,828.63
				$0.00	$0.00
	National History Day Coordinator	20.0000	32	$640.00	$33,371.46
	Education Specialist: Tempe	19.5000	40	$780.00	$40,671.46
	Education Specialist: Flagstaff	18.0000	40	$720.00	$37,542.89
	Education Specialist: Yuma	18.1500	40	$726.00	$37,855.75
	Vice President	37.1100	40	$1,484.40	$77,400.92
	Publications Editor	22.0000	40	$880.00	$45,885.75
	History Engagement Coordinator	23.1000	40	$924.00	$48,180.04
				$0.00	$0.00
	Vice President	30.3800	40	$1,215.20	$63,364.05
	Flagstaff Operations Manager Guest Experience Coordinator	25.0000	40	$1,000.00	$52,142.90
	Guest Experience Specialist: Tempe	18.7500	40	$750.00	$39,107.18
	Guest Experience Specialist: Flagstaff	17.0000	40	$680.00	$35,457.17
	Guest Experience Specialist: Tucson	17.0000	40	$680.00	$35,457.17
	Guest Experience Specialist: Yuma	17.0000	40	$680.00	$35,457.17
	Vice President	34.0000	40	$1,360.00	$70,914.34
	Archivist: Southern	23.2900	40	$931.60	$48,576.33
	Archivist: Southern	22.6900	40	$907.60	$47,324.90
	Archivist: Northern-Central	22.2500	40	$890.00	$46,407.18
	Archivist: Northern-Central	22.2500	40	$890.00	$46,407.18
	Collections Supervisor Northern-Central	22.0000	40	$880.00	$45,885.75
	Collections Specialist: Northern-Central	18.7000	32	$598.40	$31,202.31
	Collections Registrar: Southern	19.5000	40	$780.00	$40,671.46
	Collections Specialist: Southern	18.1500	32	$580.80	$30,284.60
	Exhibits Supervisor Southern	22.0000	40	$880.00	$45,885.75
	Exhibits Specialist: Southern	18.1500	40	$726.00	$37,855.75
	Exhibits Coordinator: Northern-Central	19.5000	40	$780.00	$40,671.46
	Exhibits Specialist: Northern-Central	18.1500	40	$726.00	$37,855.75
				$0.00	$0.00
	Vice President	39.6600	40	$1,586.40	$82,719.50
	Volunteer Coordinator	20.0000	40	$800.00	$41,714.32
	Facilities Coordinator	26.9200	40	$1,076.80	$56,147.47
	Facilities Specialist: Southern	24.2000	32	$774.40	$40,379.46
	Facilities Specialist: Northern-Central	21.5000	40	$860.00	$44,842.89
	Facilities Specialist: Northern-Central	17.5000	40	$700.00	$36,500.03
	Total Payroll	**1,117.9700**	**1,808.0000**	**$44,070.40**	**$2,297,958.46**
	43.12% ERE				**$990,879.69**
	Total Cost				**$3,288,838.15**

^

ARIZONA
HISTORICAL
SOCIETY

Strategic Plan 2019 - 2024

GOAL 1: CREATE A UNIFIED IDENTITY FOR THE ORGANIZATION (INTERNAL AND EXTERNAL)

Strategy 1.1. Establish AHS as a strong, recognizable brand.

Objective 1.1.1. Improve identification of historic sites and museums as entities within the AHS brand.

Objective 1.1.2. Standardize use of Arizona Historical Society as "The Brand", in all communications and marketing.

Objective 1.1.3. Engage staff to develop strong sense of unified AHS identity.

Objective 1.1.4. Increase public awareness of AHS.

Objective 1.1.5. Engage support groups and boards in discussions about the need for an AHS branded approach.

Objective 1.1.6 Establish universal AHS membership branding.

Strategy 1.2. Enhance Certified Museum program.

Objective 1.2.1. Create greater value for AHS Certified organizations and greater identification with AHS as a respected historical organization and partner.

Strategy 1.3. Develop performance and financial reporting metrics to reflect new organizational structure.

Objective 1.3.1. Modify reporting and budgetary alignment to reflect functional organization with emphasis on the AHS organization as a single entity.

GOAL 2: ENHANCE FINANCIAL RESOURCES TO ADVANCE OUR MISSION AND ENSURE LONG-TERM SUSTAINABILITY AND GROWTH

Strategy 2.1. Develop a planned giving program.

Objective 2.1.1. Diversify revenue streams to reduce dependence on appropriated funds.

Objective 2.1.2. Develop a high-functioning 501(c)3 for stewardship of gifts.

Strategy 2.2. Develop a grant-writing program.

Objective 2.2.1. Diversify revenue streams to reduce dependence on appropriated funds.

Strategy 2.3. Launch a capital campaign.

Objective 2.3.1. Build endowment, address deferred capital projects, create new exhibitions, and improve stewardship of collection and archival materials.

Strategy 2.4. Establish relationships with elected officials.

Objective 2.4.1. Build awareness of AHS's mission and vision and an understanding of the essential role that AHS plays in communities across Arizona.

Strategy 2.5. Maximize existing earned income streams and develop new earned income streams.

Objective 2.5.1. Diversify revenue streams to decrease dependence on appropriated funds.

Strategy 2.6. Involve affiliate organizations in overall fundraising plan.

Objective 2.6.1. Grow relationships with affiliate organizations.

Strategy 2.7. Optimize AHS's volunteer corps statewide.

Objective 2.7.1. Hire a volunteer coordinator.

Strategy 2.8. Optimize AHS staff time by providing the necessary IT resources and skills (infrastructure, hardware, software, training) to do their jobs.

Objective 2.8.1. Identify in-house staff to officially handle some IT tasks and external resources to handle other tasks.

Objective 2.8.2. Evaluate training needs.

Objective 2.8.3. Develop and prioritize IT needs list.

GOAL 3: TO BECOME THE MOST TRUSTED AUTHORITY ON ARIZONA HISTORY

Strategy 3.1. Market and communicate about our historical resources (what we have) and what we do with those resources (publications, programs, exhibitions, events, history education, research).

Objective 3.1.1. Increase online presence by adding more collections and publications.

Objective 3.1.2. Create online exhibitions for our longtime exhibitions currently on display.

Objective 3.1.3. Develop traveling exhibitions for historical organizations across the State.

Objective 3.1.4. Develop internal resources and guides to improve staff expertise in Arizona history.

Strategy 3.2. Reinvent the Journal of Arizona History as a modern scholarly journal and a trusted source for AZ history.

Objective 3.2.1. Promote the Journal to scholars / recruit esteemed authors.

Objective 3.2.2. Broaden the topics in the Journal to be more reflective of the breadth of AZ history.

Objective 3.2.3. Improve the book review section.

Objective 3.2.4. Build a database of scholars with specialties and contact information.

Strategy 3.3. To become the "go to" place for helping to provide curriculum and lesson plans to Arizona's history / social studies teachers.

Objective 3.3.1. Create a Museum in a Box program (digital or physical).

Objective 3.3.2. Explore the possibility of revising and republishing the Arizona history textbook.

Objective 3.3.3. Expand outreach program.

GOAL 4: TO IMPROVE OUR ABILITY TO COLLECT, PRESERVE, INTERPRET, AND DISSEMINATE ARIZONA'S HISTORY

Strategy 4.1. Concentrate collections on high-utility items.

Objective 4.1.1. Remove items from collections that do not directly relate to mission and items that have low utility.

Objective 4.1.2. Actively collect high-utility items with strong provenance, research, exhibit, and programming use.

Strategy 4.2. Optimize collection storages space to properly preserve materials.

Objective 4.2.1. Investigate shelving options (e.g., compact or high-bay) and additional storage options (e.g., off-site).

Objective 4.2.2. Pursue funding for additional shelving.

Objective 4.2.3. Improve object housing as needed.

Strategy 4.3. Seek federal grants to support exhibitions and programming.

Objective 4.3.1. Develop long-term (3-5 years) programming and exhibition schedules.

Objective 4.3.2. Develop detailed budget for each exhibition and program.

Strategy 4.4. Develop digital and online educational programming.

Objective 4.4.1. Evaluate digital storage options

Objective 4.4.2. Develop online educational programming.

Objective 4.4.3. Create online components for exhibitions.

Strategy 4.5. Develop plan to disseminate historical content more broadly statewide.

Objective 4.5.1. Incorporate traveling exhibitions into long-term exhibition schedule and planning.

Objective 4.5.2. Market our online catalogs of objects and archives.

GOAL 5: TO ATTRACT AUDIENCES BY CREATING TRANSFORMATIVE EXPERIENCES THROUGH HISTORY

Strategy 5.1. Engage visitors through interactive experiences using online and onsite technology.

Objective 5.1.1. Increase visitation and encourage audience growth using on-site technology.

Objective 5.1.2. Increase digital engagement to build new audiences.

Strategy 5.2. Provide visitors with participatory experiences that unite education with entertainment.

Objective 5.2.1. Create revenue-generating on and off-site tours that promote local history and environment.

Objective 5.2.2. Analyze existing programs, adopting the most successful statewide.

Objective 5.2.3. Develop merchandising/cross-sales opportunities.

Strategy 5.3. Develop experiences that are meaningful and relevant to today's audiences.

Objective 5.3.1. Create exhibitions, programs, and events that offer insights into modern-day issues through a historical lens.

Objective 5.3.2. Evaluate all AHS activities to gather data that will inform future decision making about exhibitions, events, and programs.

Strategy 5.4. Conduct studies of the guest experience at each AHS location.

Objective 5.4.1. Identify opportunities to enhance guest experiences in ways that are relevant, implementable, and impactful.

swaim
ASSOCIATES LTD
ARCHITECTS AIA

Assessment and Statement of Probable Cost

Project: Rio Nuevo / AZ Historical Society
Sosa Carrillo House Stabilization Plan
260 S Church Ave
Date May 16, 2022

Executive Summary:
Late in 2021 the Rio Nuevo Multipurpose Facilities District and the Arizona Historical Society began discussions about the possible purchase of the Sosa Carrillo by RN from AZHS. Subsequent to those initial conversations Rio Nuevo asked Swaim associates to develop an assessment and a Statement of Probable Cost to rehabilitate the house.

While the house has been in use and occupied over the last several years, much of the necessary maintenance and repairs have been deferred, leading to some fundamental issues with the house that will need to be addressed. We have identified five main areas of concern and have prepared assessment reports and cost estimates for each of the major areas. We have also prepared to Total project budget to capture these costs and the normal project overhead costs that would be associated with a project of this scope. The project budget immediately follows this executive summary. Keep in mind this is not a "bid", this is a statement of probable cost and should reasonably reflect the scope delineated in this report.

The major areas of concern are as follows:

A. The overall condition of the stucco, adobe, and the underlying wall structures. Local expert Eric Means was engaged to do a thorough investigation of the condition of the adobe and make recommendations for the stabilization of the property. While there are many approaches, Rio Nuevo believes it is in the best interest of the house to fully stabilize and restore the existing adobe, with the hope that the house will last another 50 to 100 years. See Section "A" Attached for the full report, recommendations, and cost. Costs in the report are additive and presented in the order they should be completed.
B. The Mechanical and Electrical systems of the house were last updated during the restoration of the house in the mid 1970's. GLHN Architects and Engineers were engaged to review the systems and make recommendations. While some minor electrical issues were discovered, the Mechanical systems do not meet the current code requirements for a public building and will required extensive rework. Achilles Air Conditioning Systems and Kelly Electric provided the cost for repairs based on the GLHN Report. All documents are in Section "B" attached.

7350 E SPEEDWAY 210
TUCSON, ARIZONA 85710
(520) 326-3700 FAX 326-1148

C. The roof is at the end of its service life and requires a complete replacement. Progressive roofing reviewed the roof condition and provided a quote to provide a new roofing system and replace the associated flashings. See quote in section “C” attached.
D. Once the Adobe restoration is complete, the entire house will need to be painted to protect the new plaster. Desert View Painting provided a cost for this scope included in Section “D” attached.
E. The exterior doors and windows show significant deterioration and dry-rot and will require restoration. Due to the age of the building, the doors and windows were tested for lead paint, which was found in a few areas. The lead report is attached in section “E” and the cost for the lead abatement and the door and window restoration is included in the project budget.

This report represents our best understanding of the condition of the house at this time. We have included a 15% project contingency at this time due to the probability that there will be some unforeseen conditions once the restoration begins and due the extreme volatility in the current construction environment.

Feel free to give me a call with any questions or concerns

Michael Becherer, AIA
Swaim Associates LTD Architects AIA
(520) 326-3700
mbecherer@swaimaia.com

swaim
ASSOCIATES LTD
ARCHITECTS AIA

PROJECT BUDGET

Updated 5/16/22

PROJECT NAME: Sosa Carrillo House Exterior Restoratic

ARCHITECT: Swaim Associates LTD Architects AIA

CONTRACTOR: TBD

	Revised Budget	Notes
0.0 Project Budget		
0.1		
0.2		
SUBTOTAL	$0	
1.0 DESIGN COSTS		
1.1 Architect/ Engr. Fees	$71,021	7% of 3.0
1.2 Telecomm Desgin		N/A
1.3 Estimating		N/A
1.4 Signage Design		N/A
1.5 A/V Design		N/A
SUBTOTAL	$71,021	
2.0 PLANNING/TECHNICAL COSTS		
2.1 A/E Reimbursables	$1,000	Allowance
2.2 Project Management Fees		N/A
2.3 CM@R Pre-Con Services		N/A
2.4 Soils Report	$6,550	Allowance
2.5 Survey	$5,000	Allowance
2.6 Traffic Impact Analysis		N/A
2.7 Land Acquisition		N/A
2.8 Materials Testing/Special Inspections	$3,500	Concrete Testing for Foundation repairs
2.9 Municipal Fees		
a) Permits	$12,200	
b) Development Plan review		N/A
c) Impact Fee		N/A
d) PC Sewer Connection Fees		N/A
e) Tucson Water Connection Fees		N/A
f) SW Gas		N/A
g) Communications Service		N/A
h) Electrical service		N/A
SUBTOTAL	$28,250	
3.0 DIRECT CONSTRUCTION COSTS		
3.1 Adobe Restoration	$553,000	
3.2 Door/Window Restoration	$57,753	Includes Lead Paint Abatement
3.3 New Roof	$67,990	
3.4 HVAC repairs	$116,683	
3.5 Electrical Repairs	$22,788	
3.6 GC General Conditions	$196,371	24%
SUBTOTAL	$1,014,585	
4.0 ADDITIONAL COSTS		
4.1 FF&E		
4.2		
SUBTOTAL	$0	
5.0 TOTAL ESTIMATED COSTS	$1,113,856	
5.1 OWNERS CONTINGENCY 15%	$167,078	
5.2 TOTAL PROJECT COST	**$1,280,935**	
5.3 ALLOCATED BUDGET	$0	
5.4 (OVER) UNDER AMOUNT	($1,280,935)	
6.0 Add/Deduct Alternates		
6.1		
6.2		
SUBTOTAL	$0	
7.0 Total Project Cost w/ Add Alternates	$1,280,935	
7.1 ALLOCATED BUDGET	$0	
7.2 (OVER) UNDER AMOUNT	($1,280,935)	

R

COMPLETE APPRAISAL
SUMMARY REPORT FOR

"AS IS" MARKET VALUE
AND
INVESTMENT VALUE

OF

ARIZONA HISTORICAL SOCIETY
MUSEUM AND
ADMINISTRATIVE OFFICES

LOCATED AT
933-949 EAST SECOND STREET
TUCSON, PIMA COUNTY, ARIZONA

APPRAISER'S FILE NO. S-05-128-C

EFFECTIVE DATE OF VALUE:
SEPTEMBER 19, 2005

PREPARED FOR:

MR. WILLIAM L. PONDER
ARIZONA HISTORICAL SOCIETY
949 EAST 2ND STREET
TUCSON, ARIZONA 85719

PREPARED BY:

STEVE R. COLE
CERTIFIED GENERAL REAL
ESTATE APPRAISER #30130

SOUTHWEST APPRAISAL ASSOCIATES, INC.
5205 EAST PIMA STREET
TUCSON, ARIZONA 85712

VIEW OF SOUTH ELEVATION FROM PARK AVENUE

SUBJECT PROPERTY – ENTRANCE
949 East 2nd Street

SOUTHWEST
APPRAISAL ASSOCIATES

November 3, 2005

Mr. William L. Ponder
Chief Administrative Office
Arizona Historical Society
949 E. Second Street
Tucson, AZ 85719

Re: REF: Appraiser's File No.: 05-128-C

Dear Mr. Ponder:

At your request, I have provided value opinions for the Arizona Historical Society property located at 949 East Second Street, just west of the main entrance to the University of Arizona, Tucson, Arizona. I have also provided value opinions for the vacant land for which the Society is to be paid in the event that you sell the building. The purpose of this appraisal is to provide value opinions for the above-referenced subject property, as follows:

- ***Investment Value Opinion.*** This value opinion assumes that the subject property is sold to a particular investor, namely, the Arizona Board of Regents, on behalf of the University of Arizona. The Investment Value Opinion includes the existing parking rights in the Main Gate Parking Center. The Investment Value Opinion is comprised of the value of the fee simple interest in Parcel A, which is owned by the Arizona Historical Society; plus the value of the Historical Society's leasehold interest in the improvements constructed on Parcel B. The Arizona Board of Regents is the owner of Parcel B and the lessor under the long term ground lease that encumbers Parcel B. The Historical Society, the lessee, pays no rent under the subject ground lease, as long as they continue to occupy the improvements. There are 47 years, 4 months remaining in the term of the ground lease.

- Certain clauses in the lease provide free parking in the Main Gate Parking Center to the lessee as long as they continue to own the building at 949 East Second Street. This benefit is eliminated if the building is sold to any other purchaser than the University of Arizona. As a result an investment value must be provided.

- ***Market Value Opinion.*** This value opinion is based on the assumption that the subject property is sold to any purchaser. In that event, the parking easements that provide 111 free parking spaces in the Second Street parking structure are extinguished. ***This value opinion also assumes that the University of Arizona would not prohibit any other purchaser from leasing the University owned parking facilities at market rates.***

• P.O. Box 16156 • Tucson, Arizona 85732-6156 • (520) 327-0000 • Fax (520) 327-3974 •

- ***Market Value Opinion of Land, as if vacant, for Parking Garage.*** This value opinion is for the four non-contiguous parcels of land which were deeded to the Board of Regents for the construction of the Main Gate Parking Center, one block west of the Historical Society building. If the subject property is sold, the parking easements will be extinguished, and the Historical Society is entitled to be compensated by the University of Arizona for the current fair market value of the land, as if unimproved.

The intended use of the appraisal is to provide a valuation basis for the sale of the property. The intended user of this appraisal report is the Arizona Historical Society, the client. The effective date of value is September 19, 2005, the date of the property inspection.

This is a complete appraisal, summary report which is intended to comply with the reporting requirements set forth under Standard Rule 2-2(b) of the Uniform Standards of Professional Appraisal Practice for Summary Appraisal Reports promulgated by the Appraisal Standards Board of the Appraisal Foundation.

This report is being prepared for the client. This report or any portion thereof is for the exclusive use of the client and is not intended to be used, sold, transferred, given, or relied on by any other person other than the client without the prior, expressed written permission of the author, as set forth within the Limiting Conditions contained in this report.

It is my opinion that the value conclusions for this appraisal are adequately supported with the best data available. Based upon my judgment and the data and discussions contained in this report, the market value opinions of the subject property are as follows:

INVESTMENT VALUE OPINION OF THE SUBJECT PROPERTY $10,000,000

MARKET VALUE OPINION OF SUBJECT PROPERTY $9,200,000

MARKET VALUE OPINION OF THE ORIGINAL 31,512 S.F. OF VACANT LAND USED FOR THE PARKING STRUCTURE $800,000

Based on the preceding valuation, the exposure period is projected to be 180 days or less.

EXTRAORDINARY ASSUMPTIONS/HYPOTHETICAL CONDITIONS

Extraordinary Assumptions:

1. Parking for the subject property is provided by easements granted to the Arizona Historical Society by the Arizona Board of Regents on behalf of the University of Arizona (UA). The easements were granted to the Historical Society as partial consideration for four parcels of land deeded to the Board of Regents for the construction of the Main Gate Parking Center. The parking easements can not be sold, transferred, or assigned. The UA has expressed an interest in acquiring the subject property for its use. Thus, this appraisal provides an Investment Value

Opinion, which is defined as "the specific value of an investment to a particular investor or class of investors based on individual investment requirements."

The Investment Value Opinion provided in this appraisal is based on the extraordinary assumption that the purchaser, or investor, of the subject property is the Board of Regents, on behalf of the University of Arizona (UA). As such, the UA already has adequate parking for the subject property.

2. The Market Value Opinion of the subject property excludes the value of the parking privileges granted by the parking easements. In accordance with the terms of the easements, the Historical Society's right to use 111 parking spaces would be revoked if the subject property is sold to a private investor. The lack of adequate parking facilities within reasonable proximity for employees and customers would have a significant, adverse effect on the market value of the subject property. There is no sales data available to provide a reliable market value opinion of a large commercial property that has no reasonable access to public parking. Therefore, the Market Value Opinion of the subject property is based on the following extraordinary assumption:

   The Market Value Opinion of the subject property assumes that the UA would not unreasonably prohibit public use of its parking facilities and would lease Main Gate Parking Structure spaces to the owner of the subject property at market rates.

3. The Market Value Opinion of the four non-contiguous parcels deeded to the Arizona Board of Regents for construction of the parking garage is based on the following extraordinary assumption:

   It is an extraordinary assumption of this appraisal that the four non-contiguous parcels totaling 31,512 square feet are sold in one transaction to one entity.

I hereby certify that to the best of my knowledge and belief, all statements and opinions contained in this appraisal report are correct. This transmittal letter is not valid for any purpose unless accompanied by the appraisal referred to herein.

In order to guarantee the authenticity of this report, the designated appraiser has imprinted this letter of transmittal with an embossed seal. Any copy without same is not a certified copy and the appraiser assumes no responsibility or liability for such a report.

Respectfully submitted,

Southwest Appraisal Associates

Steven R. Cole, MAI, SRA
Certified General Real Estate
Appraiser #30130

VALUATION OF PARCEL A – FEE SIMPLE INTEREST

INVESTMENT VALUE UTILIZING SALES COMPARISON APPROACH

In the Sales Comparison Approach to value, sales of competitive improved properties are analyzed and adjusted to the subject property. This approach applies the principle of substitution which affirms that, when a property can be replaced, its value tends to be set by the cost of acquiring an equally desirable substitute property without undue or costly delay.

Adjustments to the comparable sales are made for each of the following elements of comparison: Real property rights conveyed, financing terms, conditions of sale, market conditions, location and physical characteristics. The most appropriate unit of comparison for this type of property is the sale price per square foot of floor area. This unit of comparison is calculated by dividing the sales price by the total number of square feet of the floor area.

Given the subject's museum and office use near the University of Arizona, search parameters for comparable sales included sales of commercial and other university area properties in the University District and the Tucson Metropolitan Area. The data gathered is believed sufficient to provide a reliable opinion of value through the Sales Comparison Approach.

Here follows a tabulation of the comparable improved sales, a map showing the location of each sale relative to the subject property, and photos of the comparable sales. The adjustment grid precedes the conclusion of the analysis.

FEE SIMPLE INTEREST VALUATION - PARCEL A
TABULATION SUMMARY OF IMPROVED SALES

SALE	DATE	LOCATION SELLER/BUYER TAX CODE NUMBER	PRICE TERMS DOC NO. DOM	G.B.A. / SITE AREA/ S.F.	F.A.R.	AGE / QUALITY/ CONDITION	PRICE PER S.F.	ZONING/ USE	COMMENTS	CONFIRMATION
1	5/19/2005	2230 E. Speedway Blvd. Ronald McDonald House Charities Neil L. Snyder 125-04-032A, 033A, 034A, 035A, 036A	$1,500,000 Cash to Seller 12556-2165 0 - Not on Market	10,999 45,050	0.244	83 years Avg. Class "C" Fair	$136.38	O-2, Tucson Office use	Seller will lease property from buyer.Two 1-story administrative buildings with conf./mtg. room Adequate on-site parking available.	Mike or Tim Harris Long Realty (520) 577-7400
2	4/11/2005	160 N. Stone Avenue Imperial Industrial Group 160 North Stone, LLC 105-05-023D	$1,850,000 Cash to Seller 12528-3456 No Broker	18,257 7,992	2.284	41 Years Avg. Class "C" Average	$101.33	OCR-2, Tucson Office use	Buyer was required to assume first mortgage at a higher interest rate. No parking is included. No on-site parking included.	Don Semro 884-8843
3	7/29/2003	1125 N. Vine Sigma Kappa National Housing Corp. Arizona Board of Regents on behalf of University of Arizona 123-17-041B	$1,400,000 Cash to Seller No Broker	17,930 28,741	0.624	35 years Avg. Class "C" Fair	$78.08	R-3 Educational Use	Fair to average condition; Former sorority house acquired by UA for office use. No broker. Adequate on-site parking.	Connie Yazzi UA Space Mgmt. (520) 621-3057
4	6/2/2005	378 N. Main Avenue Michael T. Johnson Tucson Owls, LLC 116-19-048B; 0500	$1,325,000 Cash to Seller 12565-7262	9,841 22,525	0.437	35 Avg. Class "C" Good	$134.64	HO-3, Tucson Local Commercial	Improvements were renovated in 1985 & 2002, updated to modern standards. Historic character preserved, but layout is functional for office use. 36 on-site parking spaces provided;	Michael Johnson Seller (520) 881-9419
SUBJECT PARCEL A		**933-949 E. 2nd Street Fee Simple Interest 124-04-097B**	**G.B.A. Site Area Basement**	**34,793 18,900 20,237**	**1.841**	**32 Years**	**N/A**	**C-1**	**Arizona Historical Society Museum and Administrative Offices**	**N/A**

ImpTab 05-128-C

Legend: G.B.A. = Gross Building Area
F.A.R. = Floor Area Ratio

Arizona Historical Society Museum Collections & Archives Storage Proposal

Presented By:

Matt Bevacqua
&
Scott Fero

interior SOLUTIONS

Collections & Archive Storage

Collection Storage Rooms

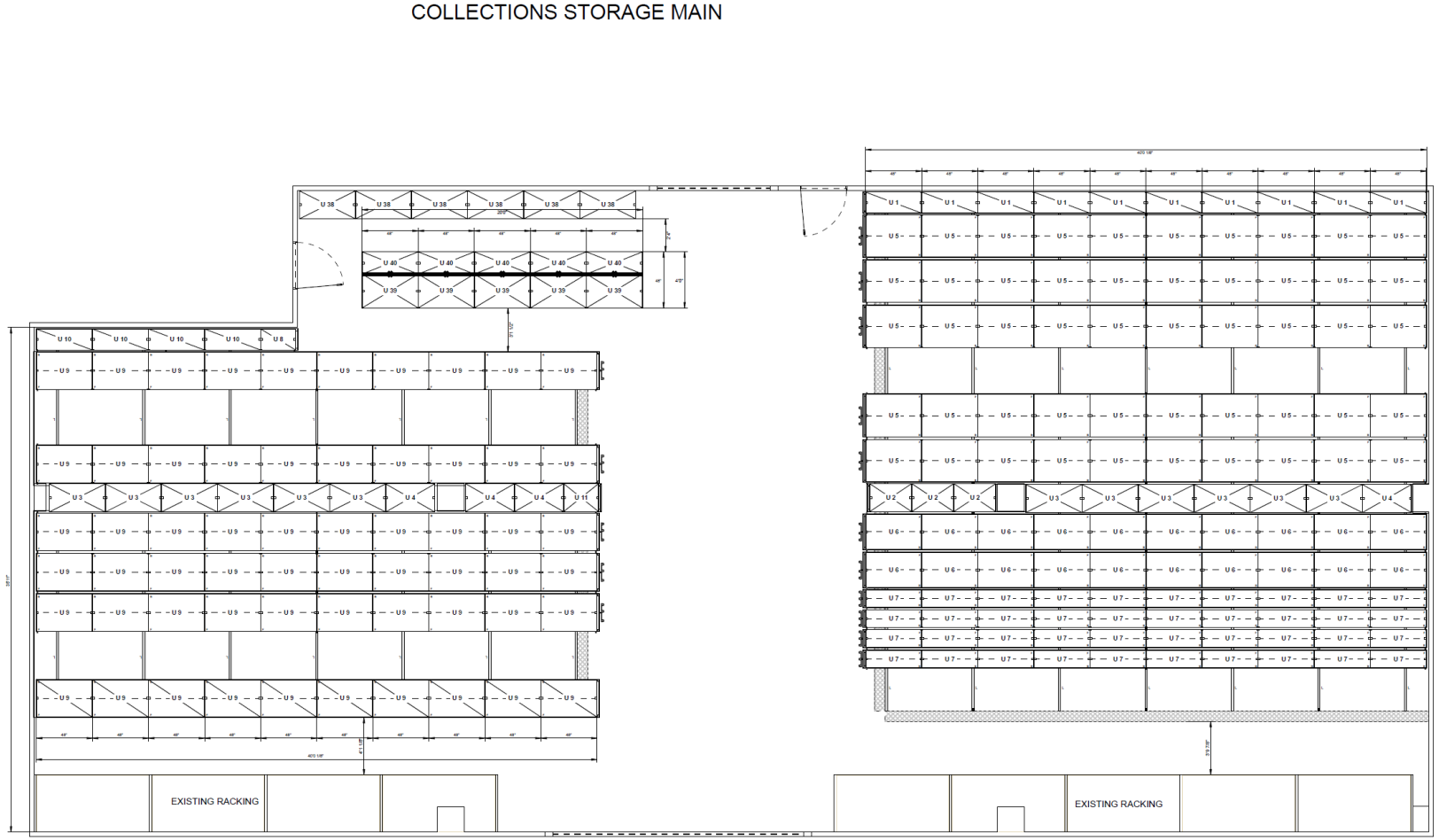
- Collections Storage Main
- Collections Storage Back Room

Archive Storage Rooms

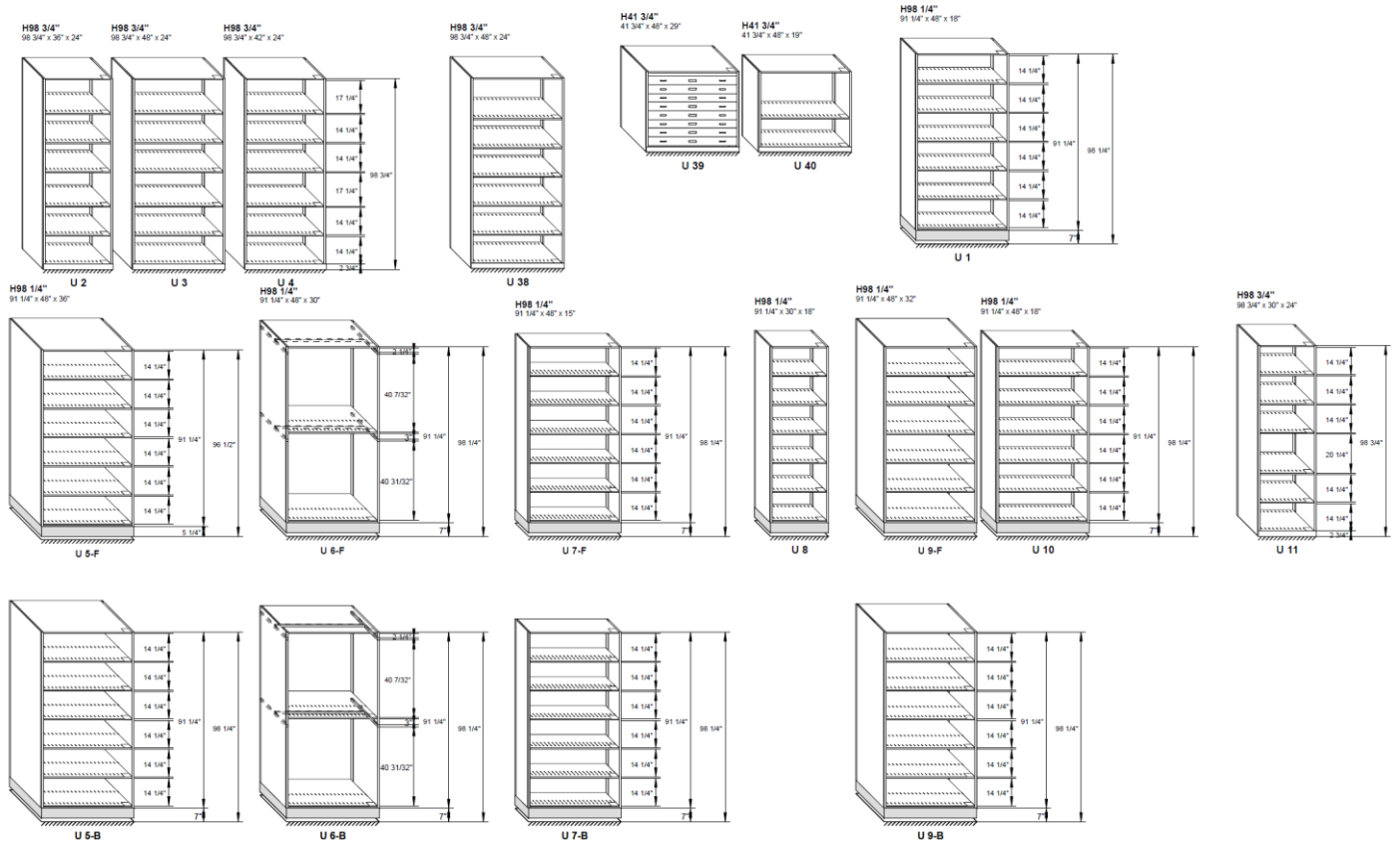
- First Floor Stack Room
- Annex 2
- Room 223
- Second Floor Stack Room
- Third Floor Stack Room

interior SOLUTIONS

Collections Storage Main



Collections Storage Main



Collections Storage Main

PROPOSED SOLUTIONS, RECOMMENDATIONS AND EQUIPMENT

Per discussions with Dr. Breeckner and staff, and a complete onsite survey with measurements of 7 different storage rooms, that house various collections and archives. Interior Solution's is proposing to provide, deliver, and install multiple Spacesaver Mechanical Assist High Density Mobile Storage Systems with Spacesaver four-post and wide-span shelving. Interior Solution's will also provide Spacesaver mobile art rack, stationary four-post shelving, and Viking flat file cabinets.

COLLECTIONS STORAGE MAIN

Interior Solution's is proposing 4 mechanical assist high density storage systems in the Collections Storage Main Room. Each system will help to maximize your storage footprint and allow for multiple user access at one time. The rails for the high-density system will be recessed in the existing concrete. This will include saw cutting troughs in the existing concrete. All four high density systems will provide approximately 15,686 cubic square feet of useable storage space. Please see attached drawing and elevations.

1. **System 1 is approximately 40'l x 22'9"w x 8'2-1/"t = 6,000 csf.**
   a. U1 = (1) Static run approximately 40'l x 1'6"d x 8'2-1/4"t
   b. U2 = (1) Static run approximately 9'l x 2'd x 8'2-3/4"t
   c. U3 = (1) Static run approximately 24'l x 2'd x 8'2-3/4"t
   d. U4 = (1) Static run approximately 3'6"l x 2'd x 8'2-3/4"t
   e. U5 = (5) Moveable carriages approximately 40'l x 3'd x 8'2-3/4"

Shelving Elevations

1. U1 (10) Sections measuring 98-1/4"t x 48"w x 18"d
   a. (1) Powder coated steel base shelf
   b. (5) Powder coated adjustable steel shelf
   c. (1) Powder coated solid steel canopy top

Collections Storage Main

2. U2 (3) Sections measuring 98-3/4”t x 36”w x 24”d
   a. (1) Powder coated steel base shelf
   b. (5) Powder coated adjustable steel shelves
   c. (1) Powder coated steel canopy top
   d. (1) Powder coated steel 2-3/4” base

3. U3 (6) Sections measuring 98-3/4”t x 48”w x 24”d
   a. (1) Powder coated steel base shelf
   b. (5) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top
   d. (1) Powder coated steel 2-3/4” base

4. U4 (1) Section measuring 98-3/4”t x 42”w x 24”d
   a. (1) Powder coated steel base shelf
   b. (5) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top
   d. (1) Powder coated steel 2-3/4” base

5. U5 (50) Sections measuring 91-1/4”t x 48”w x 36”d
   a. (1) Powder coated steel base shelf
   b. (5) Powder coated steel adjustable shelves
   c. (1) Powder coated steel canopy top

1. **System 2 is approximately 40’l x 14’2”w x 8’2-1/4”t = 3,345 csf.**
   a. U6 = (2) Moveable carriages approximately 40’l x 2’6”d x 8’2-1/4”t
   b. U7 = (4) Moveable carriages approximately 40’l x 1’3”d x 8’2-1/4”t

Shelving Elevations

1 U6 (20) Sections measuring 91-1/4”t x 48”w x 30”d
   a. (1) Powder coated steel base shelf
   b. (1) Powder coated steel adjustable shelf
   c. (1) Powder coated steel canopy top
   d. (2) Powder coated steel hanging garment rod

2. U7 (8) Sections measuring 92-1/4”t x 20’w x 15”d
   a. (1) Powder coated steel art rack
   b. (1) Powder coated steel canopy top

Collections Storage Main

1. **System 3 is approximately 40’l x 13’1”w x 8’2-1/4”t. = 2,668 csf.**
   a. U3 = (1) Static run approximately 24’l x 2’d x 8’2-3/4”t
   c. U4 = (1) Static run approximately 10’6”l x 2’d x 8’2-3/4”t
   d. U8 = (1) Static run approximately 2’6”l x 1’6”d x 8’2-3/4”t
   e. U9 = (2) Mobile carriages approximately 40’l x 2’8”d x 8’2-1/4”t
   f. U10 = (1) Static run approximately 16’l x 1’6”d x 8’2-1/4”t
   g. U11 = (1) Static run approximately 2’6”l x 2’d x 8’2-3/4”t

Shelving Elevations

1. U3 (6) Sections measuring 98-3/4”t x 48”w x 24”d
   a. (1) Powder coated steel base shelf
   b. (5) Powder coated adjustable steel shelves
   e. (1) Powder coated solid steel canopy top
   f. (1) Powder coated steel 2-3/4” base

2. U4 (3) Sections measuring 98-3/4”t x 42”w x 24”d
   a. (1) Powder coated steel base shelf
   b. (5) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top
   d. (1) Powder coated steel 2-3/4” base

3. U8 (1) Section measuring 98-3/4”t x 30”w x 28”d
   a. (1) Powder coated steel base shelf
   b. (5) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top

4. U9 (20) Sections measuring 98-1/4”t x 48”w x 32”d
   a. (1) Powder coated steel base shelf
   b. (5) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top

5. U10 (4) Sections measuring 98-1/4”t x 48”w x 18”d
   a. (1) Powder coated steel base shelf
   b. (5) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top

6. U11 (1) Section measuring 98-3/4”t x 30”w x 24”d
   a. (1) Powder coated steel base shelf
   b. (5) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top

Collections Storage Main

1. **System 4 is approximately 40’l x 14’9”w x 8’2-1/4”t = 3,673 csf.**
   a. U9 = (4) Mobile carriages approximately 40’l x 2’8”d x 8’2-1/4”t

Shelving Elevations

1. U9 (40) Sections measuring 98-1/4”t x 48”w x 32”d
   a. (1) Powder coated steel base shelf
   b. (5) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top

PROPOSED MODE OF OPERATION:
Mechanical assist control provides mechanical advantage for easy carriage operation with ergonomically designed three spoked drive operator that transfers power to the carriage’s drive axle through roller chains and sprockets concealed behind the face panels. The three spoked handle with rotating soft touch hand knobs, is mounted in the center of each moveable carriage face panel. Each spoke operator houses a safety lock control with a visual indicator. This alerts users to the lock’s operational status.

RAIL ASSEMBLY
Spacesaver’s L rail assembly of low-profile 1035 steel extrusion with tongue and groove rail joints. Permanent floor anchors and narrow wheel guidance gaps. Interior Solution’s will saw cut troughs into the existing concrete, and then the rails are laser-leveled and anchored to the existing concrete floor. Once leveled, the rails are fully grouted with an 8,000 lb. hydraulic grout.

GUIDANCE & DRIVE SYSTEM
Spacesaver’s roller bearing anti-tip guidance system features precision machined and balanced wheels with a design that provides an all-rail guidance system with built in anti-tip safety. Permanently lubricated and shielded bearing assemblies provide long term, maintenance free operation.

Spacesaver’s “Multiple Synchro Drive System” provides balanced carriage movement on the drive wheels. This allows heavy storage loads to be shifted and reorganized as needed without sacrificing the systems overall performance.

FOUR POST SHELVING
Spacesaver four-post welded shelving is constructed of 22-gauge cold rolled steel. Designed to assemble without fasteners or clips, shelf supports lock into keyholes on the inner side of the upright, and each individual shelf is adjustable every 1-1/2”. Spacesaver’s supports its products with a lifetime limited warranty against manufacturer’s defects and workmanship.

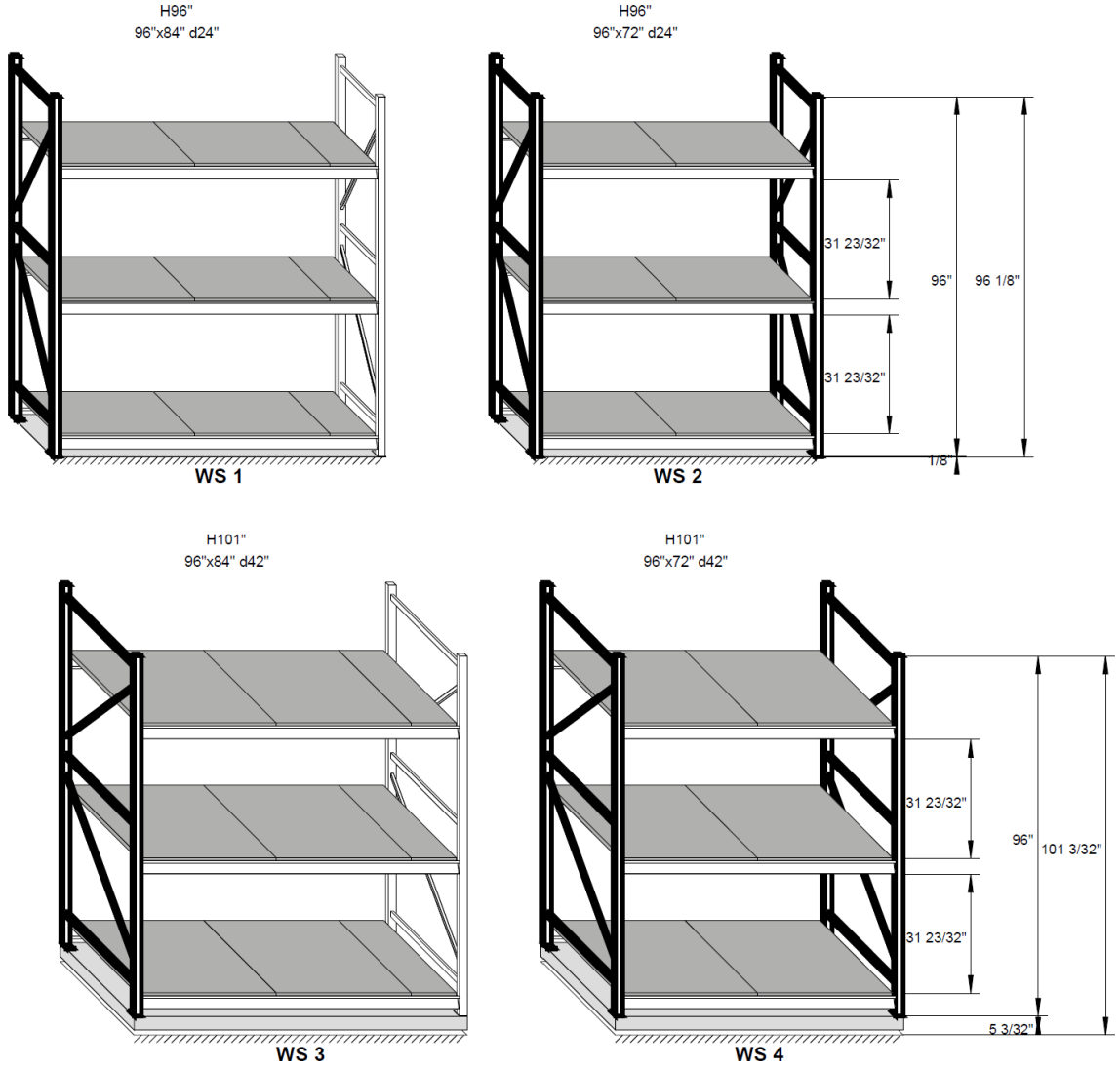
MECHANICAL SAFETY SWEEP
Spacesaver’s mechanical safety sweep provides full aisle protection for people and objects in the open aisles of mobile storage systems by automatically stopping the carriage movement upon contact with an obstacle.

STEEL FACE PANELS
Spacesaver’s 18-gauge mobile system face panels provide a strong, steel finish that feature a one-piece structural construction. Each panel is powder coat painted for a hard, durable finish.

WARRANTY
Lifetime limited warranty against any manufacturer’s defects and workmanship for the lifetime of the structural frames. 10-year limited warranty that all carriage drive motors shall be free from defects in material and workmanship.

Collections Storage Back Room

Collections Storage Back Room



Collections Storage Back Room

COLLECTIONS STORAGE BACK ROOM

Interior Solution's is proposing 1 mechanical assist high density storage system in the Collections Storage Back Room. The rails for the high-density system will be recessed in the existing concrete. This will include saw cutting troughs in the existing concrete. The high-density storage system will provide a total of 3,308 cubic storage feet of useable shelf space. Please see attached drawing and elevations.

1. **System is approximately 14'4"l x 35'5"w x 8'3"t = 3,308 csf.**
   a. WS1 = (2) Static runs each approximately 7'l x 2'd x 8't
   b. WS2 = (2) Static runs each approximately 6'l x 2'd x 8't
   c. WS3 & WS4 = (7) Moveable carriages approximately 14'4"l x 3'6"d x 8'2-3/4"t

Shelving Elevations

1. WS1 (2) Sections measuring 96"t x 84"w x 24"d
   a. (3) Powder coated adjustable steel shelves

2. WS2 (2) Sections measuring 96"t x 72"w x 24"d
   a. (3) Powder coated adjustable steel shelves

3. WS3 (7) Sections measuring 99"t x 84"w x 42"d
   a. (3) Powder coated adjustable steel shelves

4. WS4 (7) Sections measuring 99"t x 72"w x 42"d
   a. (3) Powder coated adjustable steel shelves

Collections Storage Back Room

PROPOSED MODE OF OPERATION:

Mechanical assist control provides mechanical advantage for easy carriage operation with ergonomically designed three spoked drive operator that transfers power to the carriage's drive axle through roller chains and sprockets concealed behind the face panels. The three spoked handle with rotating soft touch hand knobs, is mounted in the center of each moveable carriage face panel. Each spoke operator houses a safety lock control with a visual indicator. This alerts users to the lock's operational status.

RAIL ASSEMBLY

Spacesaver's L rail assembly of low-profile 1035 steel extrusion with tongue and groove rail joints. Permanent floor anchors and narrow wheel guidance gaps. Interior Solution's will saw cut troughs into the existing concrete, and then the rails are laser-leveled and anchored to the existing concrete floor. Once leveled, the rails are fully grouted with an 8,000 lb. hydraulic grout.

GUIDANCE & DRIVE SYSTEM

Spacesaver's dual flange guidance system features precision machines and balanced wheels with a dual flange design that provides an all-rail guidance system. Permanently lubricated and shielded bearing assemblies provide long term, maintenance free operation.

Spacesaver's "Line Shaft Drive System" provides balanced carriage movement on the drive wheels. This allows heavy storage loads to be shifted and reorganized as needed without sacrificing the systems overall performance.

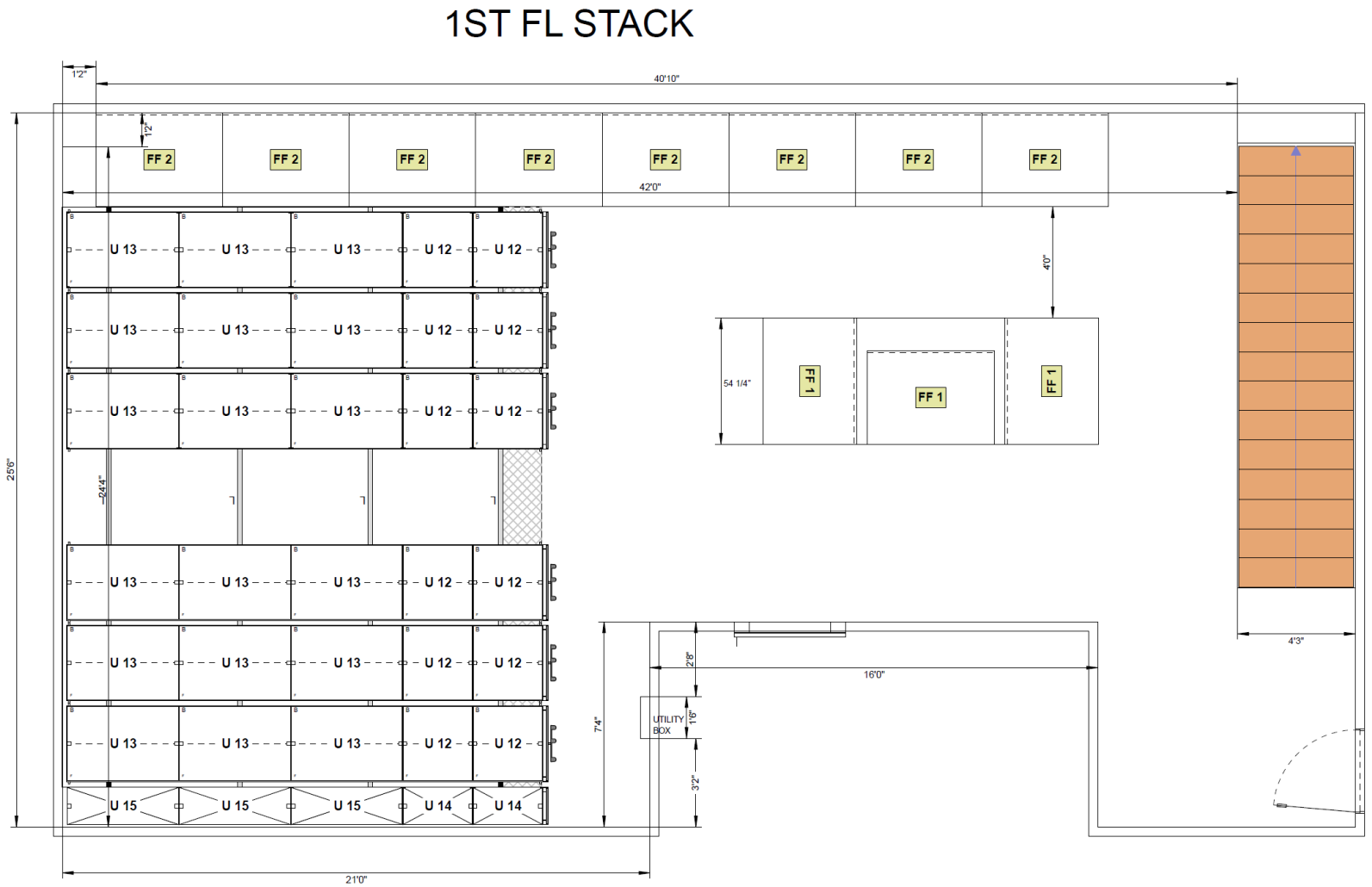
WIDE SPAN SHELVING

Spacesaver's wide span shelving upright frames are a welded truss design similar to that used for heavy duty pallet racking. All standard beams are vertically adjustable every 1-1/2". The solid steel decking is formed of 18-gauge cold rolled steel.

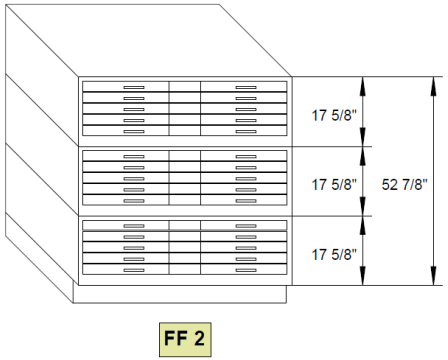
WARRANTY

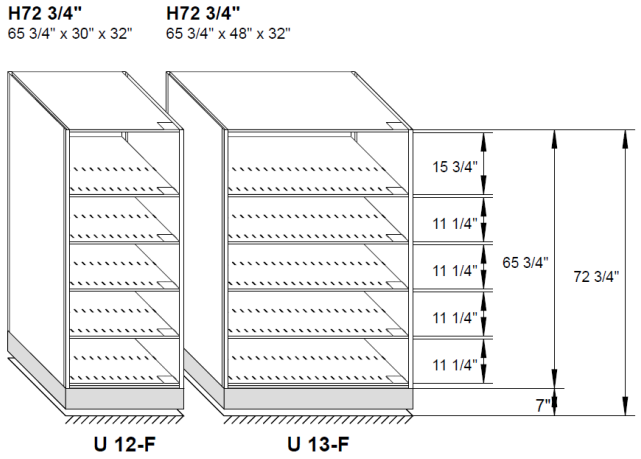
Lifetime limited warranty against any manufacturer's defects and workmanship for the lifetime of the structural frames. 10-year limited warranty that all carriage drive motors shall be free from defects in material and workmanship.

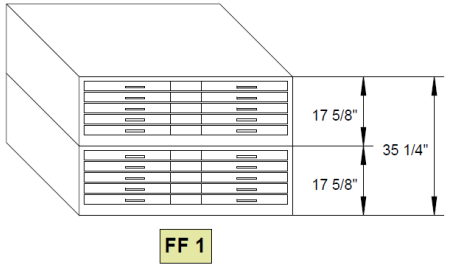
First Floor Stack Room

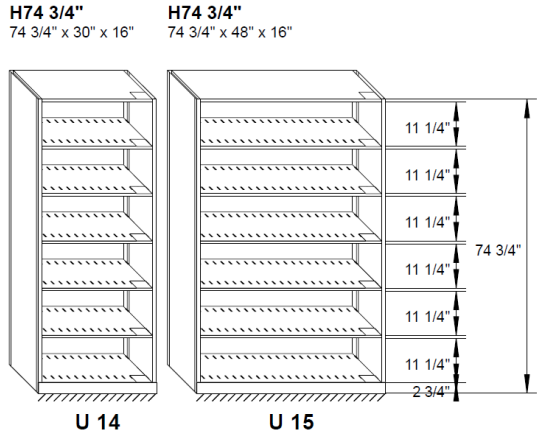


First Floor Stack Room









First Floor Stack Room

FIRST FLOOR STACK ROOM

Interior Solution's is proposing 1 mechanical assist high density storage system in the First Floor Stack Room. The high-density system will have a built-up floor and rail system. Interior Solution's will also provide, deliver, and install Viking 420 series archival flat file cabinets. The high-density system and flat file cabinets will provide a total of 2,504 cubic square feet of useable shelf space. Please see attached drawing and elevations.

1. **System is approximately 17'l x 22'-1/2"w x 5'8-3/4"t = 2,504 csf.**
   a. U12 & U13 = (6) Moveable carriages measuring 17'l x 2'8"d x 5'8-1/4"'t 1663
   b. U14 & U15 = (1) Static run approximately 17'l x 1'4"d x 5'8-3/4"'t 138
   c. FF1 = (6) Flat file cabinets approximately 4'6-1/4"l x 3'4-1/4"d x 1'5-5/8"t 140
   d. FF2 = (24) Flat file cabinets approximately 4'6-1/4"l x 3'4-1/4"d x 1'5-5/8"t 563

Shelving Elevations

1. U12 (12) Sections measuring 68-1/4"t x 30"w x 32"d
   a. (1) Powder coated steel base shelf
   b. (4) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top

2. U13 (18) Sections measuring 68-1/4"t x 48"w x 32"d
   a. (1) Powder coated steel base shelf
   b. (4) Powder coated adjustable steel shelves
   c. (1) Powder coated sold steel canopy top

3. U14 (2) Sections measuring 68-3/4"t x 30"w x 16"d
   a. (1) Powder coated steel base shelf
   b. (4) Powder coated adjustable steel shelves
   c. (1) Powder coated steel canopy top

4. U15 (3) Sections measuring 68-3/4"t x 48"w x 16"d
   a. (1) Powder coated steel base shelf
   b. (4) Powder coated adjustable steel shelves
   c. (1) Powder coated steel canopy top

5. FF1 (6) Flat File Cabinets measuring 54-1/4"l x 40-1/4"d x 17-5/8"t
   a. (5) Powder coated 2.5"t steel drawers
   b. (1) Powder coated steel 4" base
   c. (4) Adjustable floor levelers
   d. (1) High pressure laminate work surface

6. FF2 (24) Flat File Cabinets measuring 54-1/4"l x 40-1/4"d x 17-5/8"t
   a. (5) Powder coated 2.5"t steel drawers
   b. (1) Powder coated steel 4" base
   c. (4) Adjustable floor levelers

First Floor Stack Room

PROPOSED MODE OF OPERATION:

Mechanical assist control provides mechanical advantage for easy carriage operation with ergonomically designed three spoked drive operator that transfers power to the carriage's drive axle through roller chains and sprockets concealed behind the face panels. The three spoked handle with rotating soft touch hand knobs, is mounted in the center of each moveable carriage face panel. Each spoke operator houses a safety lock control with a visual indicator. This alerts users to the lock's operational status.

RAIL ASSEMBLY

Spacesaver's L rail assembly of low-profile 1035 steel extrusion with tongue and groove rail joints. Permanent floor anchors and narrow wheel guidance gaps. Interior Solution's will saw cut troughs into the existing concrete, and then the rails are laser-leveled and anchored to the existing concrete floor. Once leveled, the rails are fully grouted with an 8,000 lb. hydraulic grout.

GUIDANCE & DRIVE SYSTEM

Spacesaver's roller bearing anti-tip guidance system features precision machined and balanced wheels with a design that provides an all-rail guidance system with built in anti-tip safety. Permanently lubricated and shielded bearing assemblies provide long term, maintenance free operation.

Spacesaver's "Multiple Synchro Drive System" provides balanced carriage movement on the drive wheels. This allows heavy storage loads to be shifted and reorganized as needed without sacrificing the systems overall performance.

FOUR POST SHELVING

Spacesaver four-post welded shelving is constructed of 22-gauge cold rolled steel. Designed to assemble without fasteners or clips, shelf supports lock into keyholes on the inner side of the upright, and each individual shelf is adjustable every 1-1/2". Spacesaver's supports its products with a lifetime limited warranty against manufacturer's defects and workmanship.

MECHANICAL SAFETY SWEEP

Spacesaver's mechanical safety sweep provides full aisle protection for people and objects in the open aisles of mobile storage systems by automatically stopping the carriage movement upon contact with an obstacle.

STEEL FACE PANELS

Spacesaver's 18-gauge mobile system face panels provide a strong, steel finish that feature a one-piece structural construction. Each panel is powder coat painted for a hard, durable finish.

VIKING MUSEUM CABINETS

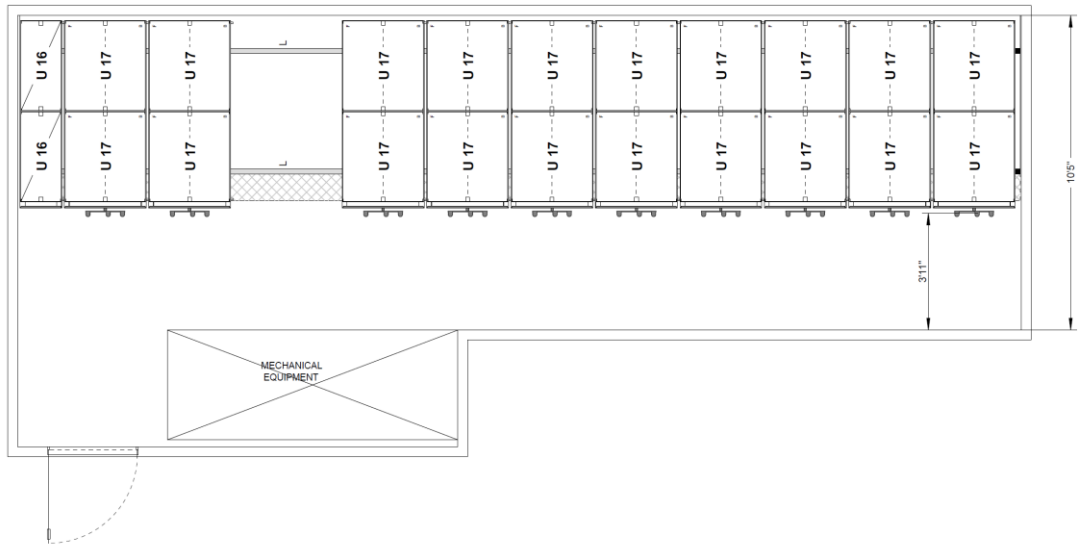
The Viking Museum Model 420 flat file cabinet features a convenient stackable design that helps you make the most of your floor space, and if stack two units high, provides a useful extra working surface.

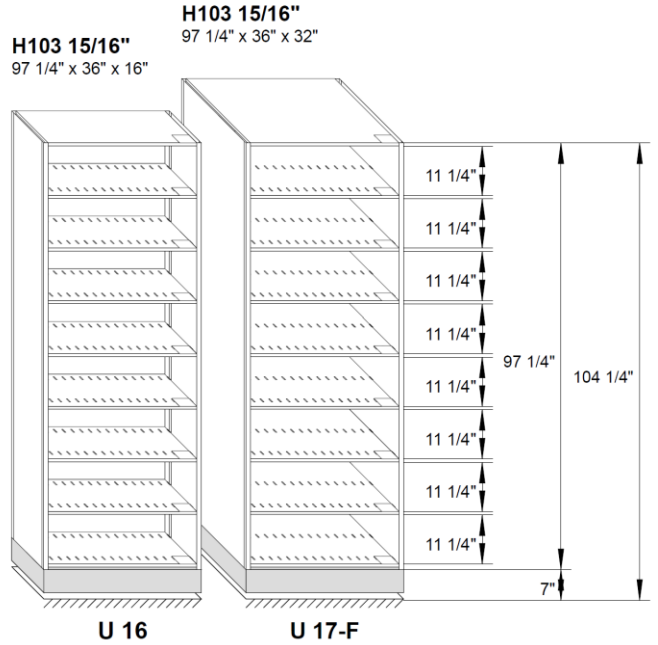
WARRANTY

Lifetime limited warranty against any manufacturer's defects and workmanship for the lifetime of the structural frames. 10-year limited warranty that all carriage drive motors shall be free from defects in material and workmanship.

Annex 2

ANNEX 2





Annex 2

ANNEX 2

Interior Solution's is proposing 1 mechanical assist high density storage system in the Annex 2 room. The high-density system will have a built-up floor and rail system. The high-density system will provide a total of 2,080 cubic square feet of useable shelf space. Please see attached drawing and elevations.

1. **System is approximately 6'l x 33'1-9/16"w x 8'8-1/4"t = 2,080 csf.**
   a. U16 = (1) Stationary run measuring 6'l x 1'4"d x 8'8-1/4"'t
   b. U17 = (10) Mobile carriages measuring 6'l x 3'8"d x 8'8-1/4"t

Shelving Elevations

1. U16 (2) Sections measuring 104-1/4"t x 36"w x 16"d
   a. (1) Powder coated steel base shelf
   b. (7) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top
2. U17 (20) Sections measuring 104-1/4"t x 36"w x 32"d
   a. (1) Powder coated steel base shelf
   b. (7) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top

PROPOSED MODE OF OPERATION:

Mechanical assist control provides mechanical advantage for easy carriage operation with ergonomically designed three spoked drive operator that transfers power to the carriage's drive axle through roller chains and sprockets concealed behind the face panels. The three spoked handle with rotating soft touch hand knobs, is mounted in the center of each moveable carriage face panel. Each spoke operator houses a safety lock control with a visual indicator. This alerts users to the lock's operational status.

RAIL ASSEMBLY

Spacesaver's L rail assembly of low-profile 1035 steel extrusion with tongue and groove rail joints. Permanent floor anchors and narrow wheel guidance gaps. Interior Solution's will saw cut troughs into the existing concrete, and then the rails are laser-leveled and anchored to the existing concrete floor. Once leveled, the rails are fully grouted with an 8,000 lb. hydraulic grout.

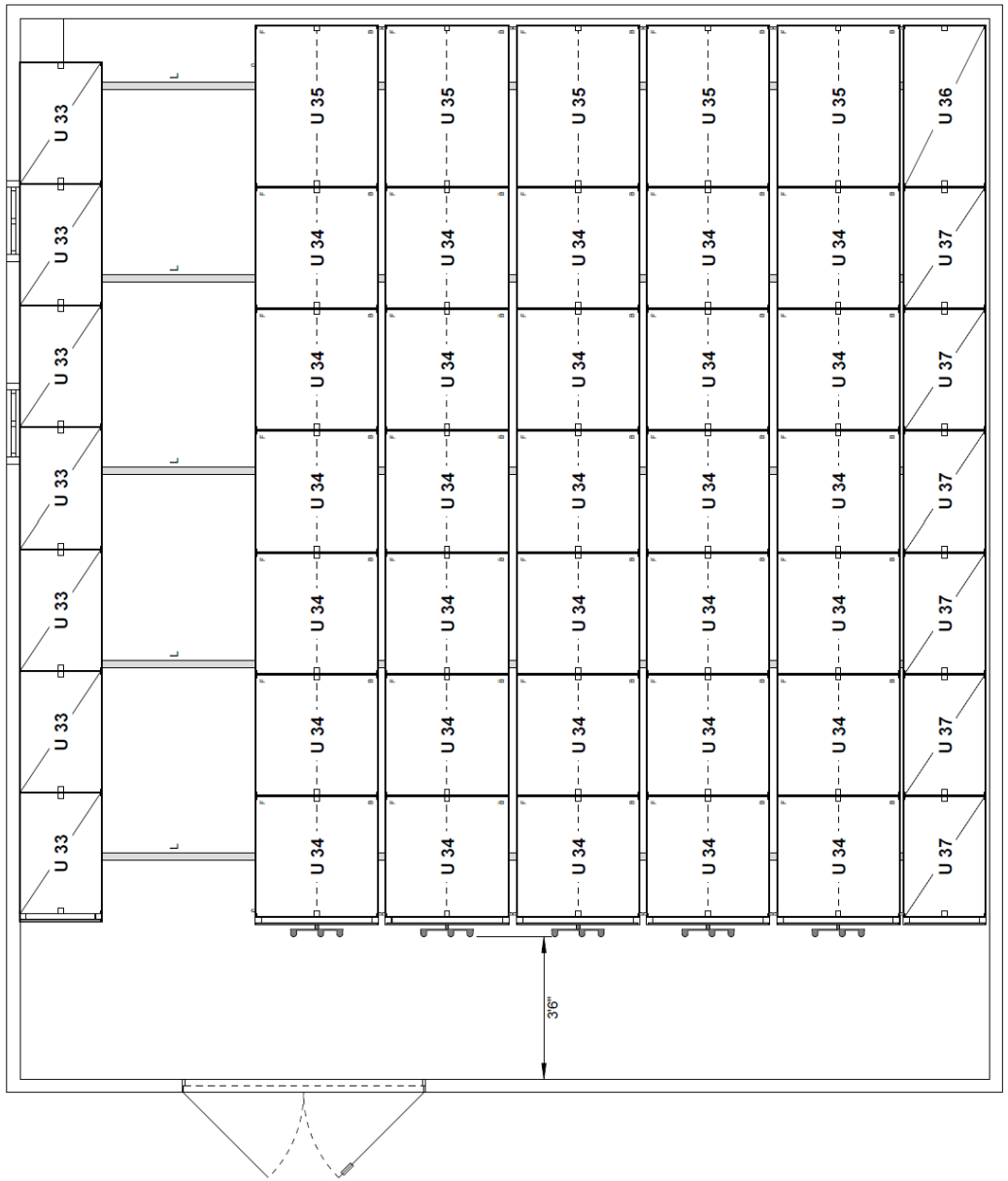
GUIDANCE & DRIVE SYSTEM

Spacesaver's roller bearing anti-tip guidance system features precision machined and balanced wheels with a design that provides an all-rail guidance system with built in anti-tip safety. Permanently lubricated and shielded bearing assemblies provide long term, maintenance free operation.

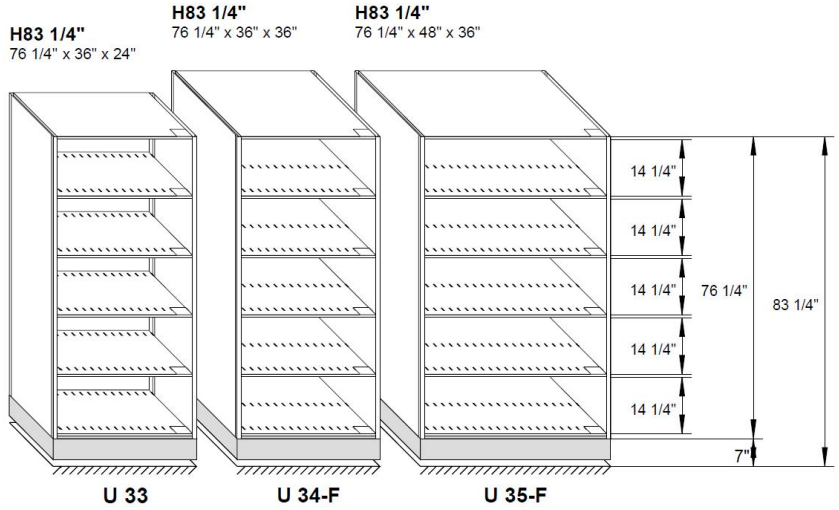
Spacesaver's "Multiple Synchro Drive System" provides balanced carriage movement on the drive wheels. This allows heavy storage loads to be shifted and reorganized as needed without sacrificing the systems overall performance.

Room 223

ROOM 223



Room 223


H83 1/4"
76 1/4" x 36" x 24"
H83 1/4"
76 1/4" x 36" x 36"
H83 1/4"
76 1/4" x 48" x 36"
14 1/4"
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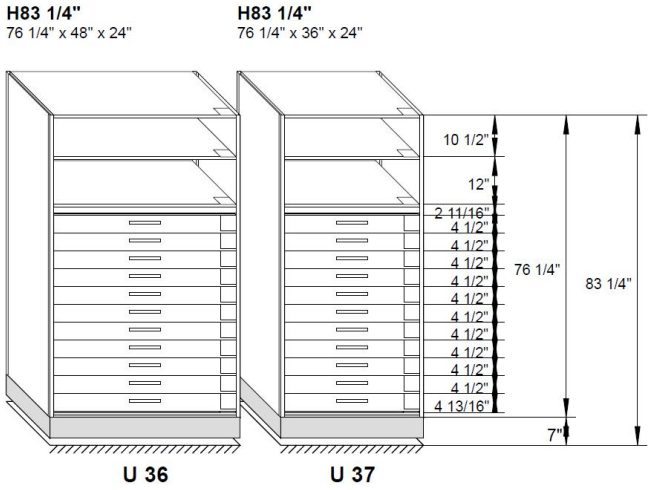
83 1/4"
7"
U 33
U 34-F
U 35-F


H83 1/4"
76 1/4" x 48" x 24"
H83 1/4"
76 1/4" x 36" x 24"
10 1/2"
12"
2 11/16"
4 1/2"
4 1/2"
4 1/2"
4 1/2"
4 1/2"
4 1/2"
4 1/2"
4 1/2"
4 1/2"
4 1/2"
4 13/16"
76 1/4"
83 1/4"
7"
U 36
U 37

Room 223

ROOM 223

Interior Solution's is proposing 1 mechanical assist high density storage system in the First Floor Stack Room. The high-density system will have a built-up floor and rail system. The high-density will provide a total of 2,926 cubic square feet of useable shelf space. Please see attached drawing and elevations.

1. **System is approximately 22'l x 24'w x 6'11-1/4"t = 2,926 csf.**
   a. U33 = (1) Stationary run measuring 22'l x 2'd x 6'11-1/4"'t
   b. U34 & U35 = (5) Mobile carriages measuring 22'l x 3'd x 6'11-1/4"t
   c. U36 & U37 = (1) Stationary run measuring 22'l x 2'd x 6'11-1/4"t

Shelving Elevations

1. U33 (7) Sections measuring 83-1/4"t x 36"w x 24"d
   a. (1) Powder coated steel base shelf
   b. (4) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top

2. U34 (30) Sections measuring 83-1/4"t x 36"w x 36"d
   a. (1) Powder coated steel base shelf
   b. (4) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top

3. U35 (5) Sections measuring 83-1/4"t x 48"w x 36"d
   a. (1) Powder coated steel base shelf
   b. (4) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top

4. U36 (1) Section measuring 83-1/4"t x 48"w x 24"d
   a. (1) Powder coated steel base shelf
   b. (2) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top
   d. (11) Powder coated 4.5" h steel drawers with dividers

5. U37 (6) Sections measuring 83-1/4"t x 36"w x 24"d
   a. (1) Powder coated steel base shelf
   b. (2) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top
   d. (11) Powder coated 4.5"h steel drawers with dividers

Room 223

PROPOSED MODE OF OPERATION:

Mechanical assist control provides mechanical advantage for easy carriage operation with ergonomically designed three spoked drive operator that transfers power to the carriage's drive axle through roller chains and sprockets concealed behind the face panels. The three spoked handle with rotating soft touch hand knobs, is mounted in the center of each moveable carriage face panel. Each spoke operator houses a safety lock control with a visual indicator. This alerts users to the lock's operational status.

RAIL ASSEMBLY

Spacesaver's L rail assembly of low-profile 1035 steel extrusion with tongue and groove rail joints. Permanent floor anchors and narrow wheel guidance gaps. Interior Solution's will saw cut troughs into the existing concrete, and then the rails are laser-leveled and anchored to the existing concrete floor. Once leveled, the rails are fully grouted with an 8,000 lb. hydraulic grout.

GUIDANCE & DRIVE SYSTEM

Spacesaver's roller bearing anti-tip guidance system features precision machined and balanced wheels with a design that provides an all-rail guidance system with built in anti-tip safety. Permanently lubricated and shielded bearing assemblies provide long term, maintenance free operation.

Spacesaver's "Multiple Synchro Drive System" provides balanced carriage movement on the drive wheels. This allows heavy storage loads to be shifted and reorganized as needed without sacrificing the systems overall performance.

FOUR POST SHELVING

Spacesaver four-post welded shelving is constructed of 22-gauge cold rolled steel. Designed to assemble without fasteners or clips, shelf supports lock into keyholes on the inner side of the upright, and each individual shelf is adjustable every 1-1/2". Spacesaver's supports its products with a lifetime limited warranty against manufacturer's defects and workmanship.

MECHANICAL SAFETY SWEEP

Spacesaver's mechanical safety sweep provides full aisle protection for people and objects in the open aisles of mobile storage systems by automatically stopping the carriage movement upon contact with an obstacle.

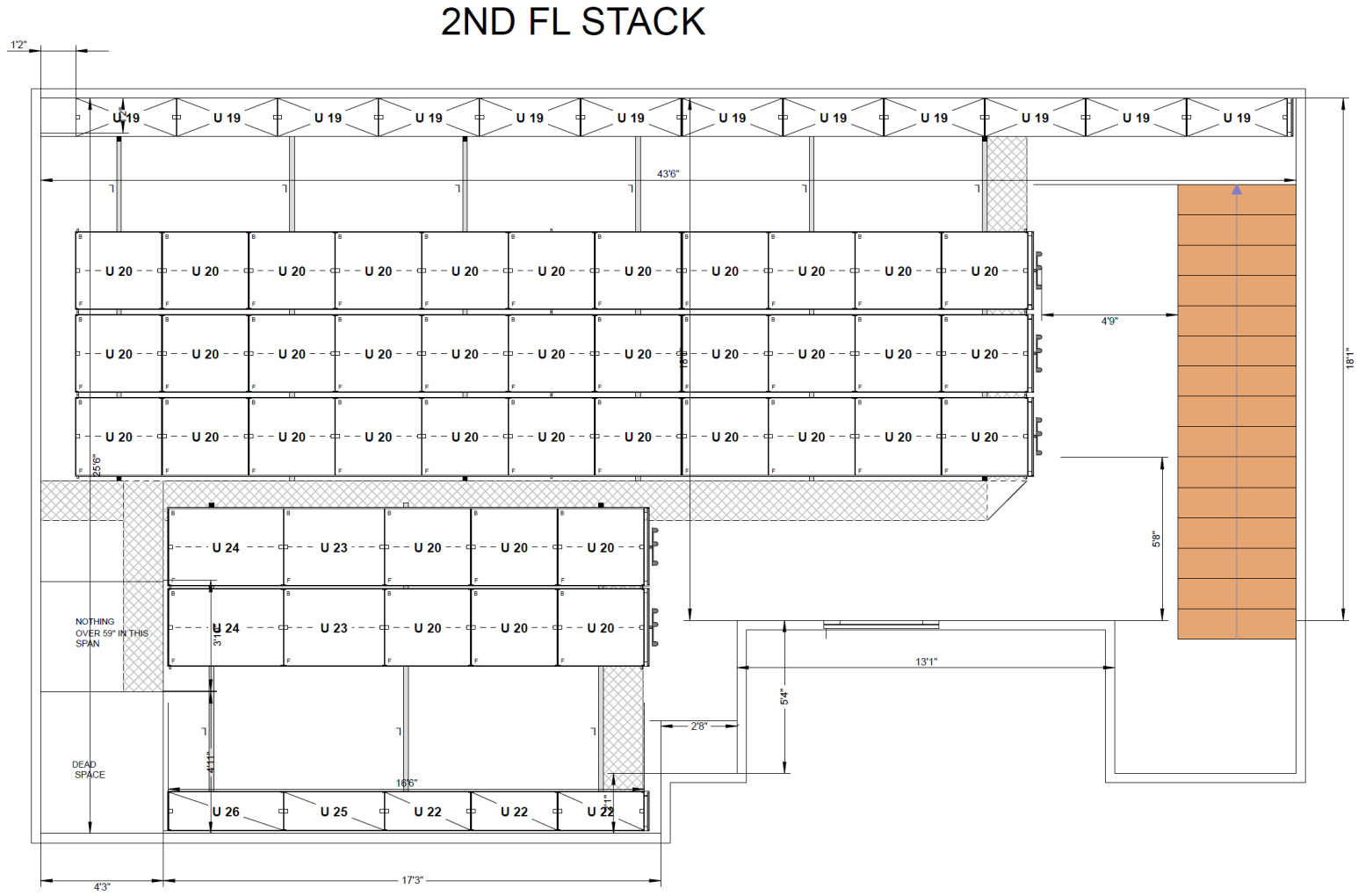
STEEL FACE PANELS

Spacesaver's 18-gauge mobile system face panels provide a strong, steel finish that feature a one-piece structural construction. Each panel is powder coat painted for a hard, durable finish.

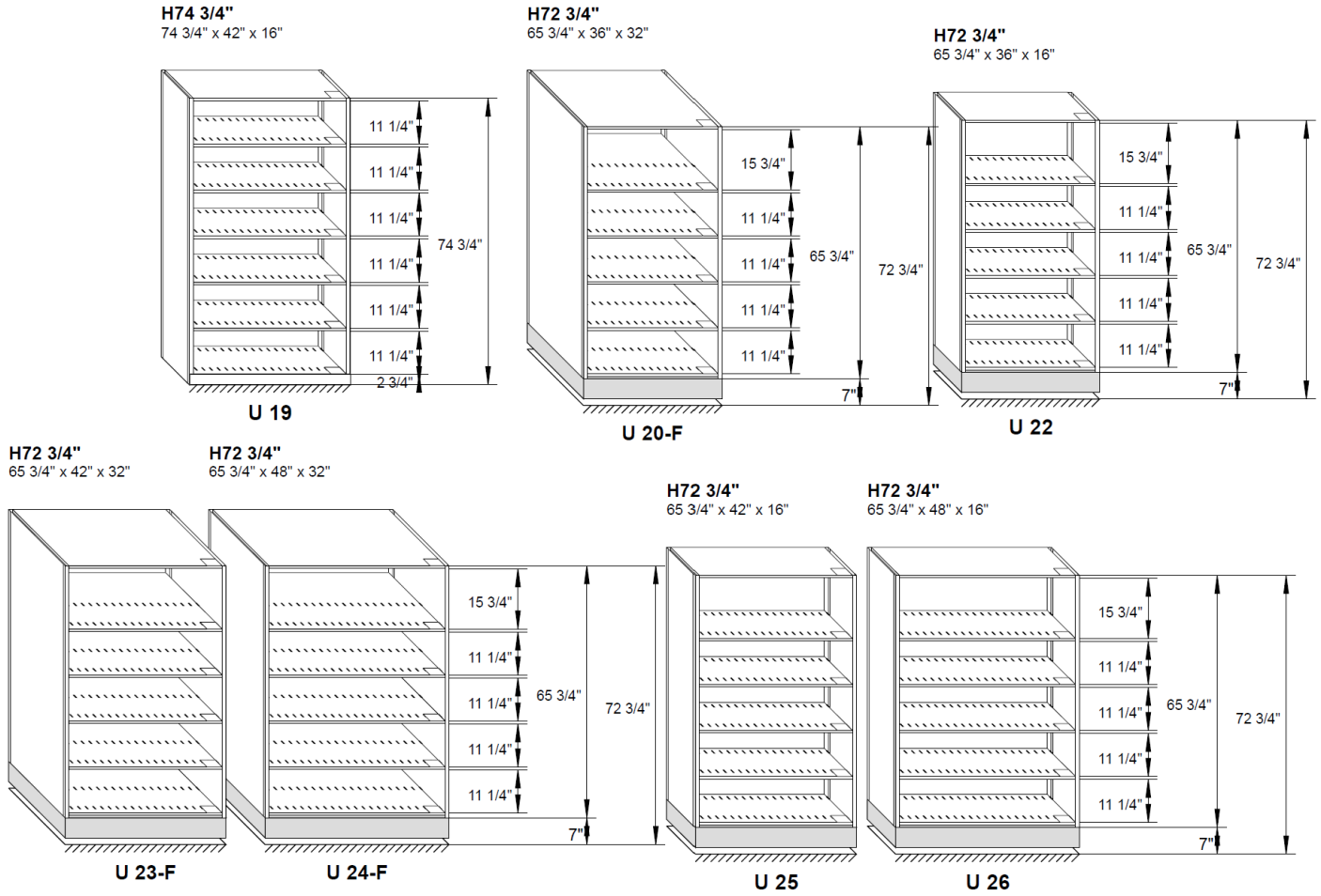
WARRANTY

Lifetime limited warranty against any manufacturer's defects and workmanship for the lifetime of the structural frames. 10-year limited warranty that all carriage drive motors shall be free from defects in material and workmanship.

Second Floor Stack Room



Second Floor Stack Room



Second Floor Stack Room

SECOND FLOOR STACK ROOM

Interior Solution's is proposing 2 mechanical assist high density storage system in the Second Floor Stack Room. The high-density system will have a built-up floor and rail system. The high-density systems will provide a total of 2,724 cubic square feet of useable shelf space.

Please see attached drawing and elevations.

1. **System 1 is approximately 33'l x 13'3"w x 6'- 3/4"t = 2,027 csf.**
   a. U19 = (1) Stationary run measuring 42'l x 1'4"d x 6'2-3/4"'t
   b. U20 = (3) Mobile carriages measuring 33'l x 2'8"d x 6'-3/4"t

Shelving Elevations

1. U19 (12) Sections measuring 74-3/4"t x 42"w x 16"d
   a. (1) Powder coated steel base shelf
   b. (5) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top
   d. (1) Powder coated steel 2-3/4" base

2. U20 (33) Sections measuring 72-3/4"t x 36"w x 32"d
   d. (1) Powder coated steel base shelf
   e. (4) Powder coated adjustable steel shelves
   f. (1) Powder coated solid steel canopy top

Second Floor Stack Room

1. **System 2 is approximately 16’6”l x 11’4”w x 6’- 3/4”t = 697 csf.**
   a. U20, U23 , & U24 = (2) Mobile carriages measuring 16’6”l x 2’8”d x 6’-3/4”t
   b. U22, U25, & U26 = (1) Static run measuring 16’6”l x 1’4”d x 6’-3/4”t

Shelving Elevations

1. U20 (6) Sections measuring 72-3/4”t x 36”w x 32”d
   a. (1) Powder coated steel base shelf
   b. (4) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top

2. U23 (2) Sections measuring 72-3/4”t x 42”w x 32”d
   a. (1) Powder coated steel base shelf
   b. (4) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top

3. U24 (2) Sections measuring 72-3/4”t x 48”w x 32”d
   a. (1) Powder coated steel base shelf
   b. (4) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top

4. U22 (3) Sections measuring 72-3/4”t x 36”w x 16”d
   a. (1) Powder coated steel base shelf
   b. (4) powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top

5. U25 (1) Section measuring 72-3/4”t x 42”w x 16”d
   a. (1) Powder coated steel base shelf
   b. (5) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top

6. U26 (1) Section measuring 72-3/4”t x 48”w x 16”d
   a. (1) Powder coated steel base shelf
   b. (5) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top

Second Floor Stack Room

PROPOSED MODE OF OPERATION:

Mechanical assist control provides mechanical advantage for easy carriage operation with ergonomically designed three spoked drive operator that transfers power to the carriage's drive axle through roller chains and sprockets concealed behind the face panels. The three spoked handle with rotating soft touch hand knobs, is mounted in the center of each moveable carriage face panel. Each spoke operator houses a safety lock control with a visual indicator. This alerts users to the lock's operational status.

RAIL ASSEMBLY

Spacesaver's L rail assembly of low-profile 1035 steel extrusion with tongue and groove rail joints. Permanent floor anchors and narrow wheel guidance gaps. Interior Solution's will saw cut troughs into the existing concrete, and then the rails are laser-leveled and anchored to the existing concrete floor. Once leveled, the rails are fully grouted with an 8,000 lb. hydraulic grout.

GUIDANCE & DRIVE SYSTEM

Spacesaver's roller bearing anti-tip guidance system features precision machined and balanced wheels with a design that provides an all-rail guidance system with built in anti-tip safety. Permanently lubricated and shielded bearing assemblies provide long term, maintenance free operation.

Spacesaver's "Multiple Synchro Drive System" provides balanced carriage movement on the drive wheels. This allows heavy storage loads to be shifted and reorganized as needed without sacrificing the systems overall performance.

FOUR POST SHELVING

Spacesaver four-post welded shelving is constructed of 22-gauge cold rolled steel. Designed to assemble without fasteners or clips, shelf supports lock into keyholes on the inner side of the upright, and each individual shelf is adjustable every 1-1/2". Spacesaver's supports its products with a lifetime limited warranty against manufacturer's defects and workmanship.

MECHANICAL SAFETY SWEEP ON SYSTEM 1

Spacesaver's mechanical safety sweep provides full aisle protection for people and objects in the open aisles of mobile storage systems by automatically stopping the carriage movement upon contact with an obstacle.

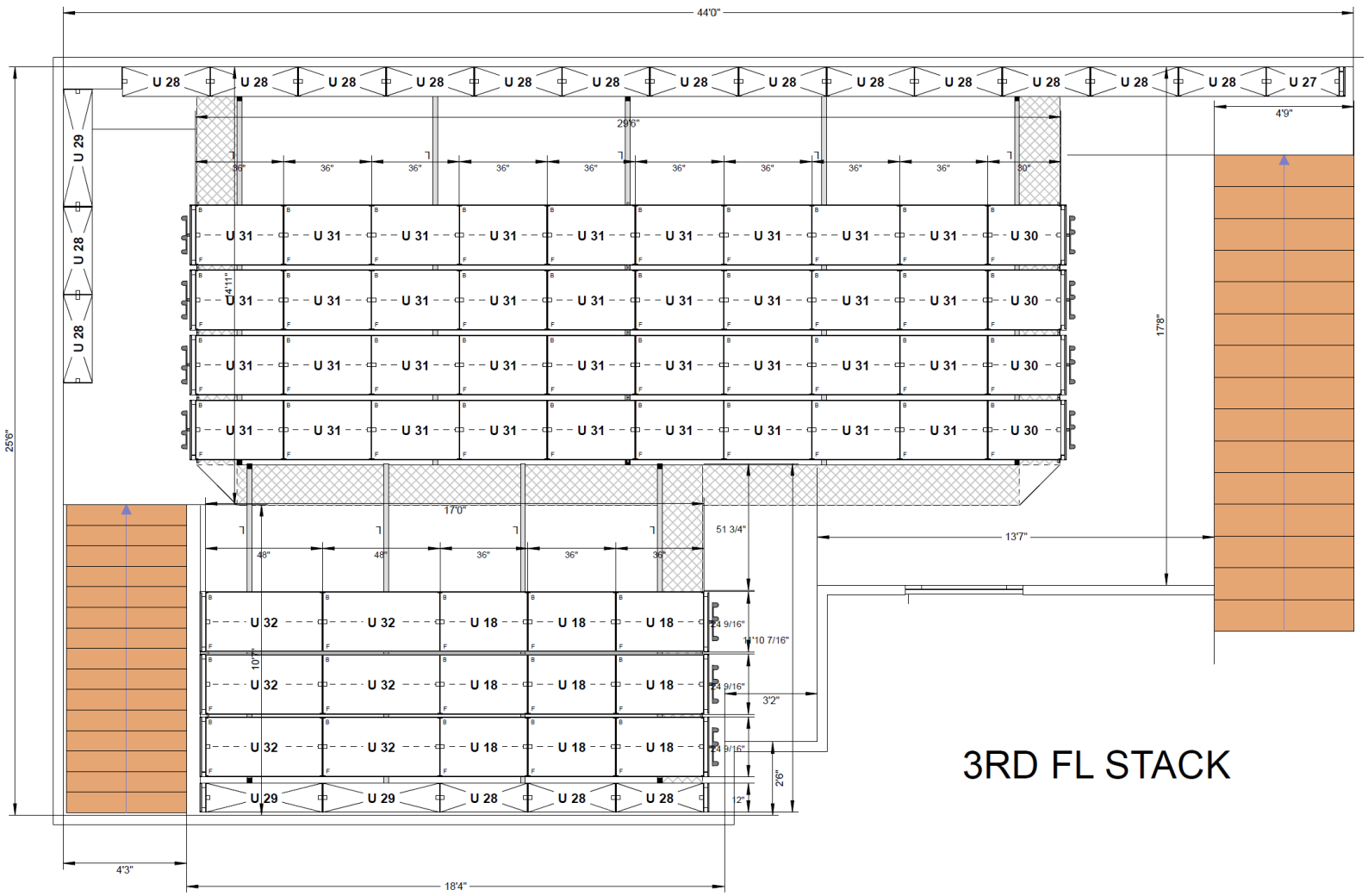
STEEL FACE PANELS

Spacesaver's 18-gauge mobile system face panels provide a strong, steel finish that feature a one-piece structural construction. Each panel is powder coat painted for a hard, durable finish.

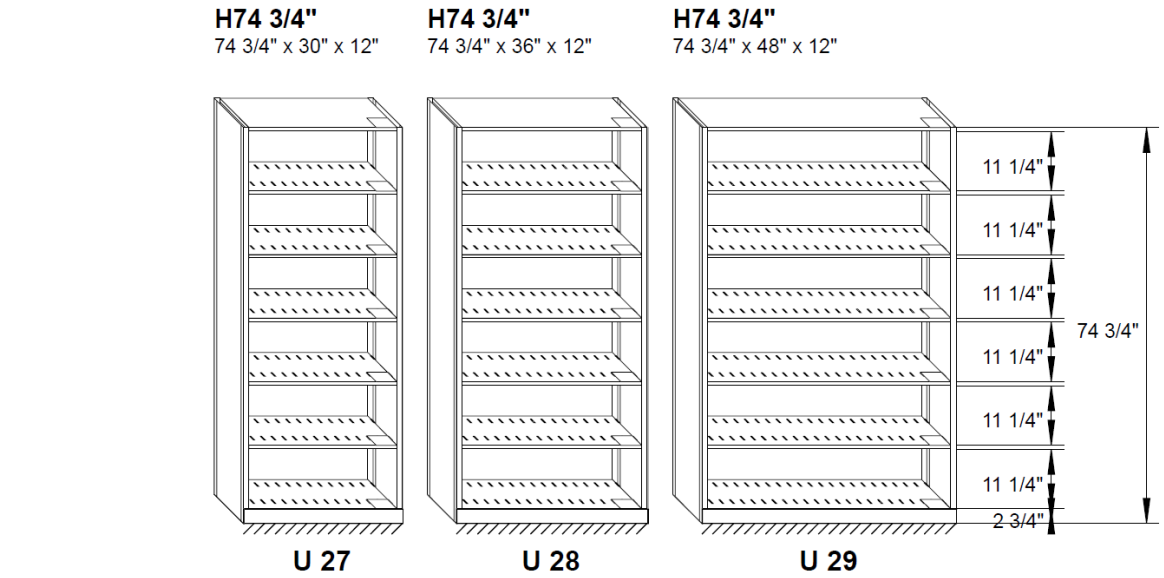
WARRANTY

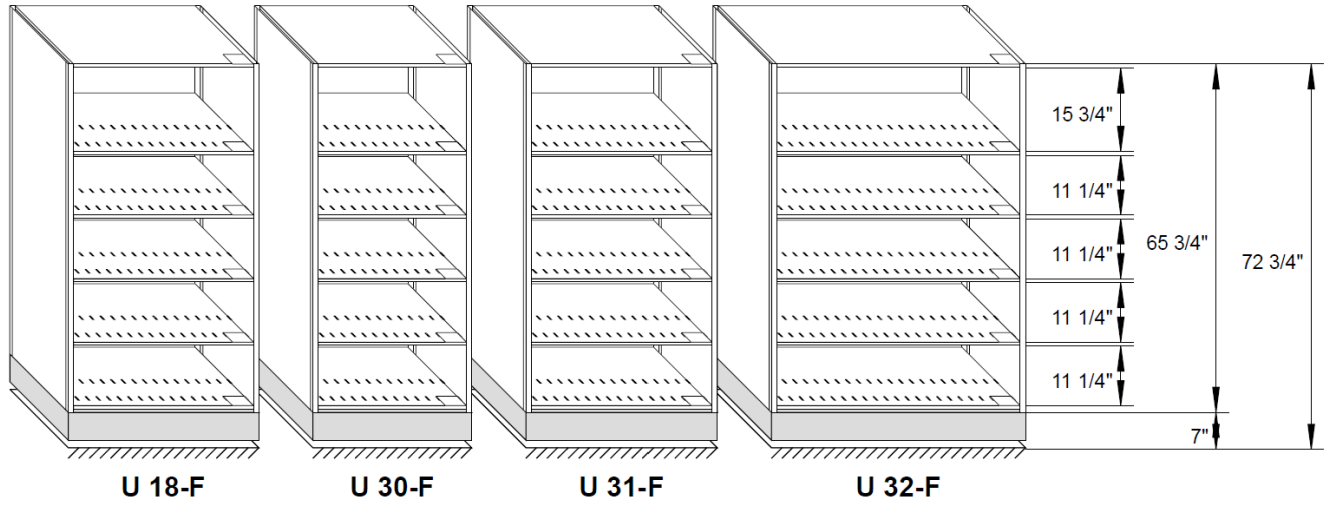
Lifetime limited warranty against any manufacturer's defects and workmanship for the lifetime of the structural frames. 10-year limited warranty that all carriage drive motors shall be free from defects in material and workmanship.

Third Floor Stack Room



Third Floor Stack Room





Third Floor Stack Room

THIRD FLOOR STACK ROOM

Interior Solution's is proposing 2 mechanical assist high density storage systems in the Second Floor Stack Room. The high-density systems will have a built-up floor and rail system. The high-density systems will provide a total of 2,513 cubic square feet of useable shelf space.
Please see attached drawing and elevations.

1. **System 1 is approximately 17'l x 14'10"w x 6'- 3/4"t = 717 csf.**
   a. U18 & U32 = (3) Mobile carriages measuring 17'l x 2'd x 6'-3/4"'t
   b. U28 & U29 = (1) Stationary run measuring 17'l x 1'd x 6'2-3/4"t

Shelving Elevations

1. U18 (9) Sections measuring 72-3/4"t x 36"w x 24"d
   a. (1) Powder coated steel base shelf
   b. (4) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top

2. U32 (6) Sections measuring 72-3/4"t x 48"w x 24"d
   a. (1) Powder coated steel base shelf
   b. (4) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top

3. U28 (3) Sections measuring 74-3/4"t x 36"w x 12"d
   a. (1) Powder coated steel base shelf
   b. (5) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top
   d. (1) Powder coated steel 2-3/4" base

4. U29 (2) Sections measuring 74-3/4"t x 48"w x 12"d
   a. (1) Powder coated steel base shelf
   b. (5) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top
   d. (1) Powder coated steel 2-3/4" base

Third Floor Stack Room

2. **System 2 is approximately 29’6”l x 13’6”w x 6’- 3/4”t = 1,796 csf.**
   a. U27 & U28 = (1) Stationary run measuring 44’l x 1’d x 6’2-3/4”t
   b. U28 & U29 = (1) Stationary run measuring 16’6”l x 1’d x 6’2-3/4”t
   c. U30 & U31 = (4) Mobile carriages measuring 29’6”l x 2”d x 6’-3/4”t +717

Shelving Elevations

1. U27 (1) Section measuring 74-3/4”t x 30”w x 12”d
   a. (1) Powder coated steel base shelf
   b. (5) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top
   d. (1) Powder coated steel 2-3/4” base

2. U28 (15) Sections measuring 74-3/4”t x 36”w x 12”d
   a. (1) Powder coated steel base shelf
   b. (5) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top
   d. (1) Powder coated steel 2-3/4” base

3. U29 (1) Section measuring 74-3/4”t x 48”w x 12”d
   a. (1) Powder coated steel base shelf
   b. (5) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top
   d. (1) Powder coated steel 2-3/4” base

4. U30 (4) Sections measuring 72-3/4”t x 30”w x 24”d
   a. (1) Power coated steel base shelf
   b. (4) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top

5. U31 (36) Sections measuring 72-3/4”t x 36”w x 24”d
   a. (1) Powder coated steel base shelf
   b. (4) Powder coated adjustable steel shelves
   c. (1) Powder coated solid steel canopy top.

Third Floor Stack Room

PROPOSED MODE OF OPERATION:

Mechanical assist control provides mechanical advantage for easy carriage operation with ergonomically designed three spoked drive operator that transfers power to the carriage's drive axle through roller chains and sprockets concealed behind the face panels. The three spoked handle with rotating soft touch hand knobs, is mounted in the center of each moveable carriage face panel. Each spoke operator houses a safety lock control with a visual indicator. This alerts users to the lock's operational status.

RAIL ASSEMBLY

Spacesaver's L rail assembly of low-profile 1035 steel extrusion with tongue and groove rail joints. Permanent floor anchors and narrow wheel guidance gaps. Interior Solution's will saw cut troughs into the existing concrete, and then the rails are laser-leveled and anchored to the existing concrete floor. Once leveled, the rails are fully grouted with an 8,000 lb. hydraulic grout.

GUIDANCE & DRIVE SYSTEM

Spacesaver's roller bearing anti-tip guidance system features precision machined and balanced wheels with a design that provides an all-rail guidance system with built in anti-tip safety. Permanently lubricated and shielded bearing assemblies provide long term, maintenance free operation.

Spacesaver's "Multiple Synchro Drive System" provides balanced carriage movement on the drive wheels. This allows heavy storage loads to be shifted and reorganized as needed without sacrificing the systems overall performance.

FOUR POST SHELVING

Spacesaver four-post welded shelving is constructed of 22-gauge cold rolled steel. Designed to assemble without fasteners or clips, shelf supports lock into keyholes on the inner side of the upright, and each individual shelf is adjustable every 1-1/2". Spacesaver's supports its products with a lifetime limited warranty against manufacturer's defects and workmanship.

MECHANICAL SAFETY SWEEP ON SYSTEM 2

Spacesaver's mechanical safety sweep provides full aisle protection for people and objects in the open aisles of mobile storage systems by automatically stopping the carriage movement upon contact with an obstacle.

STEEL FACE PANELS

Spacesaver's 18-gauge mobile system face panels provide a strong, steel finish that feature a one-piece structural construction. Each panel is powder coat painted for a hard, durable finish.

WARRANTY

Lifetime limited warranty against any manufacturer's defects and workmanship for the lifetime of the structural frames. 10-year limited warranty that all carriage drive motors shall be free from defects in material and workmanship.

Collections Storage

PROJECT MANAGEMENT

Upon receipt of your order, a project manager is assigned to insure single point responsibility. Spacesaver's shipping dates are closely monitored to ensure on-time delivery. In the event of a schedule change we will notify you immediately. Interior Solution's, Inc. installation crew is Factory Certified, Trained & Insured. They will wear our company uniform and follow the conditions in our written safety program.

Total Investment to include all material, delivery, installation, and tax:

Spacesaver Materials Cost = $1,045,264.85

Freight Wisconsin to Phoenix = $94,961.54

Project Installation Services = $269,481.11

Sales Tax on Materials Only = $83,471.86

Total Project Investment = $1,493,179.36

This is a complete turnkey project. We provide all materials, labor, and services as noted in this proposal. Our installers will meet and unload the delivery to ensure that no parts are short or damaged. At completion the shelving, and area, will be turned over to you cleaned and ready to use.

Interior Solutions wants to be your storage system supplier. We appreciate the opportunity to provide The Arizona Historical Society with this proposal. As a member of the Spacesaver group, which for the last forty-five years has taken immense pride into having each-and-every one of our over 500,000 installations to be a testimonial for our reputation, we thank you and assure you that your project will be of equal importance. We want your business the old-fashioned way and we will earn it by providing you with value-oriented products, on-time delivery, complete installation, and superior service.

Collections Storage

High Density Storage
Four-Post Shelving
Wide-Span Shelving
Mobile Art Racks
Garment Rods
Drawers
Viking Flat File Cabinets

Collections Storage

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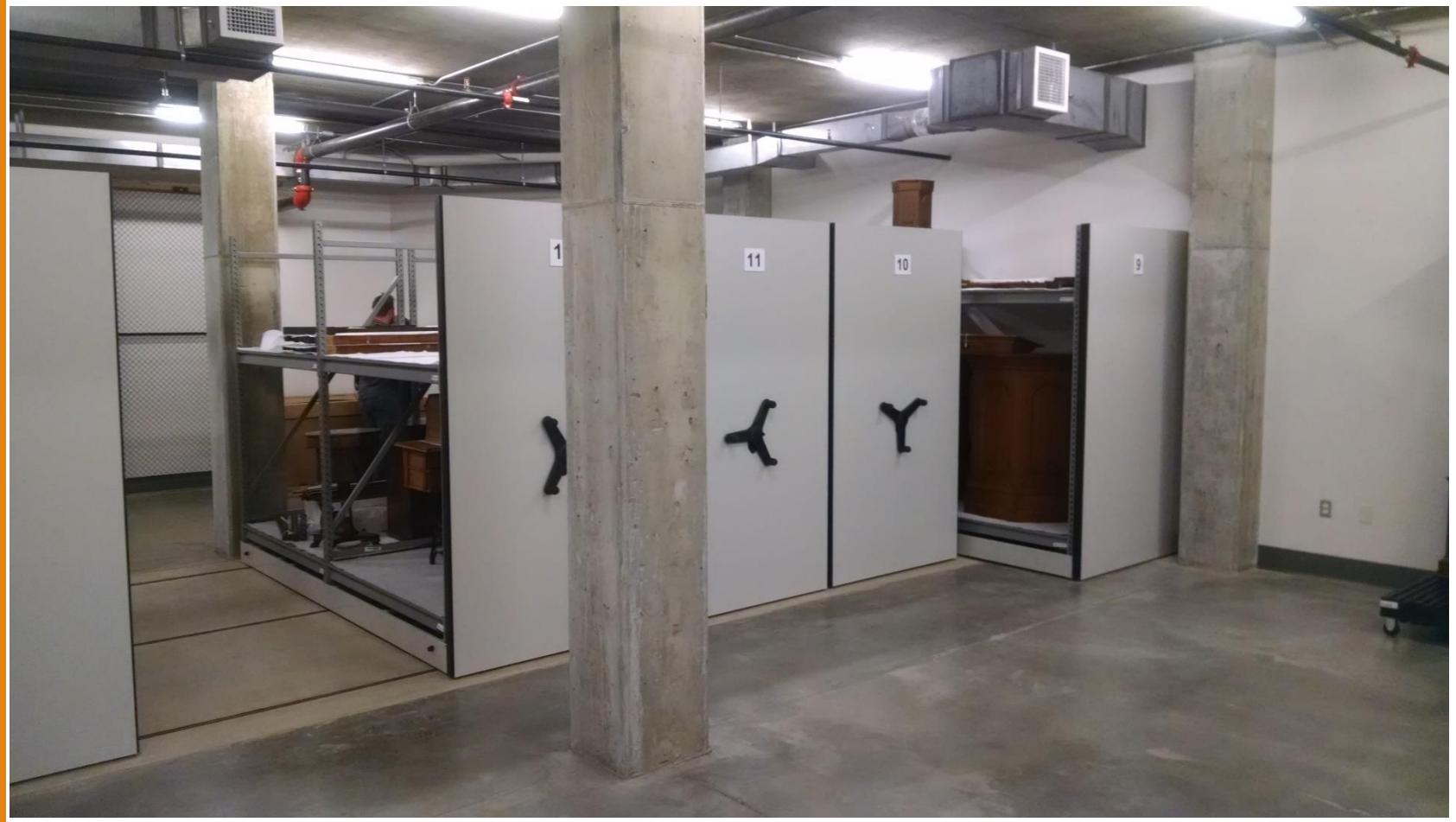

1. Mechanical Assist High Density
2. Wide-Span Shelving
3. Recessed Rails

Collections Storage

High Density
Four-Post Shelving
Wide-Span Shelving
Mobile Art Racks
Garment Rods
Drawers
Viking Flat File Cabinets

Collections Storage

High Density
Four-Post Shelving
Wide-Span Shelving
Mobile Art Racks
Garment Rods
Drawers
Viking Flat File Cabinets